

Building a Change-Ready Organisation

A strategic approach to bootlegging as an informal mechanism in post-merger change implementation

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Preface

This thesis is the final part of my Master's degree in Strategic Product Design at Delft University of Technology. Over the past several months, this research has focused on understanding how mergers and acquisitions (M&A) unfold behind the formal structures, with a strong attention to the informal practices and dynamics that usually remain out of sight but could create large impacts.

The initial spark for this topic came from a previous student job within the case company. Being part of the team during a time of significant change provided a unique view on how a merger affects the work floor. Observations in the workplace revealed that colleagues had very different ways of handling and responding to the same transitions and implementations. While some people felt ready to adapt, others showed a high level of uncertainty or frustration. Watching people develop their own informal lines to stay productive raised several interesting questions about why these reactions happen, and how organisations can see the benefit in them, therefore acknowledging and managing them.

Those early experiences led to the central theme of this research: 'bootlegging'. This term refers to the unofficial actions employees take to solve problems when formal systems feel too slow or restrictive. By exploring these dynamics, the goal of this research was to find ways to make mergers and acquisitions more likely to be successful by focusing on the human needs and behaviours rather than just financial output. Returning to the case company as a researcher to investigate the very challenges witnessed as a student has been an eye opening, challenging, and rewarding experience.

For this research, I would like to express my sincere gratitude to those who supported me throughout the process. First, I would like to thank my graduation committee of the TU Delft. I am deeply grateful to my chair, Dr. S (Shahrokh) Nikou, and my mentor N. (Nikolaos) Kyriakopoulos, for their interest, critical feedback, academic guidance, open conversations, and for pushing me to sharpen the focus of this research.

I also wish to thank the case company and group for their collaboration and opening their doors to me. In particular, I would like to thank my company supervisor, for providing the opportunity to conduct this study, the provided inputs and openness for providing help, as well as the general support throughout the research process.

A special word of thanks goes to the fifteen participants who shared their time and honest experiences with me. Your willingness to speak openly about your experiences, challenges and ways of working during the integration and implementation process was essential for the depth and credibility of this research.

The hope for this research is to offer useful and practical insights for any organisation facing complexities of a merger or any other change implementation. It is intended to serve as a guide for understanding how high-level strategy interacts with the everyday reality of the people who are expected to implement it.

In the end, we do not grow when things are easy, we grow when we face challenges. May we keep learning from each other, and keep growing from the challenges we share.

Rosemarijn Broere

Delft, 20th of March 2026

Executive Summary

Mergers and acquisitions (M&A) are often being initiated with the promise of synergy, scalability and a high chance for competitive advantages. Yet many M&A integrations fail to realise their intended value in practice (Koi-Akrofi et al., Weber & Tarba, 2012). This suggests that the underlying causes are more complex than the structural considerations and decisions and require a closer look at how change is experienced and implemented within everyday work reality. This research explores *how formal organizational change efforts interact with informal practices during post-merger integration (PMI), and what this interaction implies for achieving integration goals and anticipated synergies*. Central in this research is the role of 'bootlegging': the unofficial, often invisible practices employees develop to continue operations when formal structures are experienced as too slow, rigid, or incomplete.

This research is based on an in-depth qualitative case study of a recently merged company. The case company was created by bringing together two legacy entities with different histories, structures, and ways of working. To understand how the integration unfolded in practice, fifteen semi-structured interviews were conducted with employees and managers from different hierarchical levels of both entities. Existing literature on change management, M&A, and bootlegging was used to develop an initial framework of organizational, social, human, and cultural factors that influence integrations and change implementations. In contrast to many top-down models, this research uses a bottom-up perspective in which bootlegging and other informal practices are treated as a central analytical dimension, allowing the framework to reflect how change is actually being experienced in reality.

The findings show, that during this period of change, employees experienced a large leadership distance, fragmented communication, and increasing operational complexity. Together, these struggles contributed to four reinforcing gaps: a credibility gap between communicated intentions and perceived reality; a synergy gap between promised and realized value; an execution gap between decisions and implementation capacity; and a visibility gap between operational efforts and what higher levels actually acknowledge. In response to unclear expectations, resource constraints, and cultural frictions, employees developed informal workarounds and trust-based information lines to bridge the operational challenges. These bootlegging practices were rational, adaptive responses that allowed operations to continue, but limited knowledge sharing, learning and the realization of M&A synergies.

Based on these insights, the framework was iterated to represent a clear bottom-up, human-centered perspective on change experiences and readiness within PMI. It introduces dimensions, such as leadership visibility, system compatibility, psychological safety and voice, and vertical connectivity as key conditions for 'building a change-ready organisation'. This framework was used as a (design) tool in co-creation sessions with employees, translating analytical insights into concrete needs, priorities, and directions for action. The outcomes were defined as strategic design implications, being the base for a strategic plan. The strategic roadmap is supported by a tactical roadmap that specifies stakeholder roles, ways of working and the expected outcomes over time.

This research contributes by explicitly positioning bootlegging as a central mechanism in M&A PMI, presenting how informal practices simultaneously compensate for and reinforce the challenges and shortcomings of formal change efforts. It offers a practical approach for decision-makers to understand and work with these dynamics, moving from a top-down focus to a realistic view on how change is actually experienced and acted upon in post-merger environments.

Glossary

Bootlegging	<i>Unofficial or unauthorised practices taken by employees outside their formal roles, procedures, or resources, to solve practical challenges or progress operational requirements when formal systems feel too rigid, slow, or incomplete, with the intention to benefit the organisation.</i>
Case company	<i>The anonymised organisation at the centre of this research. Created by the M&A of two formerly independent entities, presenting the main empirical context for post-merger integration and bootlegging.</i>
Change Management	<i>The structured process of preparing, guiding, and supporting individuals and organisations through (large) transitions, including planning, communicating, support and reinforcement, providing the base for new ways of working to be adopted and sustained.</i>
Change readiness	<i>The extent to which individuals, social groups are psychologically and practically prepared to embrace a specific organisational change, including their belief that the change is necessary, fair, and beneficial, as well as their ability to cope with it.</i>
Co-creation	<i>A design approach in which stakeholders who are affected directly, or indirectly, by a change actively participate in shaping solutions and future directions, rather than only reacting to imposed plans, ensuring their experiences, needs, and expectations are reflected in the outcomes.</i>
Cultural clash	<i>The tension or friction that arises when different organisational cultures, values, and everyday practices are brought together, creating misunderstandings, attitudes, and barriers to effective integration.</i>
Cultural distance (/ Value misfit)	<i>The degree of difference between underlying values, norms, and assumptions of two organisational cultures, which could hinder cooperation and integration when this too large.</i>
Entity A/B	<i>The two anonymised legacy organisations that were acquired and merged into the case company. Each bringing their own history, structures, and culture into the integration process.</i>
Execution gap	<i>The distance between strategic intentions and what is actually implemented and executed within daily operations, often caused by unclear expectations, responsibilities, limited capacity, or misaligned support systems.</i>
Framework	<i>A structured set of dimensions, categories, and relationships that helps to analyse and understand complex phenomena. In this research used to organise formal (organisational, social, human, cultural) and informal (bootlegging) factors that influence change implementation and organisational change readiness.</i>
4-gap model	<i>The model that describes four interrelated gaps (credibility gap, synergy gap, execution gap, visibility gap) that emerged during integration and change implementation, and the reinforcing feedback loop between them.</i>
Leadership distance	<i>The perceived distance (physical and/or psychological) between different operational levels in terms of visibility, accessibility, understanding, and involvement in the operational reality.</i>

Mergers and Acquisitions	<i>Strategic top level organisational transactions where organisations are bought and sometimes combined aiming to create added value and synergies by integrating systems, cultures, and markets.</i>
Organisational fragmentation / Silos	<i>The existence of 'walls' between departments, entities, or groups, limiting cooperation and knowledge sharing. Often referred to as the 'us vs. them' principle, being reinforced by different legacies, structures, and priorities.</i>
Organisational Justice	<i>Employees' perception of fairness in change processes and outcomes, including fairness of decisions, procedures, and general human-focused treatment and communication. Shaping employee attitudes and behaviour regarding the change at hand.</i>
Overarching group	<i>The anonymised parent organisation that owns and is responsible for multiple organisations and initiated acquisition and integration fo the two entities that form the case company.</i>
Post-Merger Integration	<i>The phase after an M&A deal where the acquired companies are combining in practice; structurally, operationally, and culturally.</i>
Psychological safety	<i>A shared belief within a team or organisation that it is experienced as safe to take (inter)personal 'risks', such as raising concerns, admitting mistakes and sharing ideas, without fear of potential negative consequences.</i>
Shadow workflow	<i>A parallel, informal way of working that emerges alongside formal processes when employees create their own tools, steps, and communication lines to keep work going.</i>
Social identity (/ Group identity)	<i>The part of an individual's self-concept that derives from the connection to certain social groups.</i>
Strategic roadmap	<i>A holistic, time-bound strategic plan connecting the current situation and a desired future.</i>
Synergy gap	<i>The distance between the synergies (connectedness) and benefits that is expected to be, and the value that is actually being realised in practice during integration and implementation.</i>
Tactical roadmap	<i>The detailed, operational plan behind the strategic roadmap that specifies the steps, stakeholders and roles, ways of working, activities and conditions required to achieve and realise the future vision.</i>
Vertical connectivity	<i>The perceived quality of connection and understanding between people at different hierarchical levels within the organisation and the overarching group.</i>
Visibility gap	<i>The perceived disconnect between the efforts of employees and managers and how much these are recognised, seen, and acknowledged by higher hierarchical levels.</i>

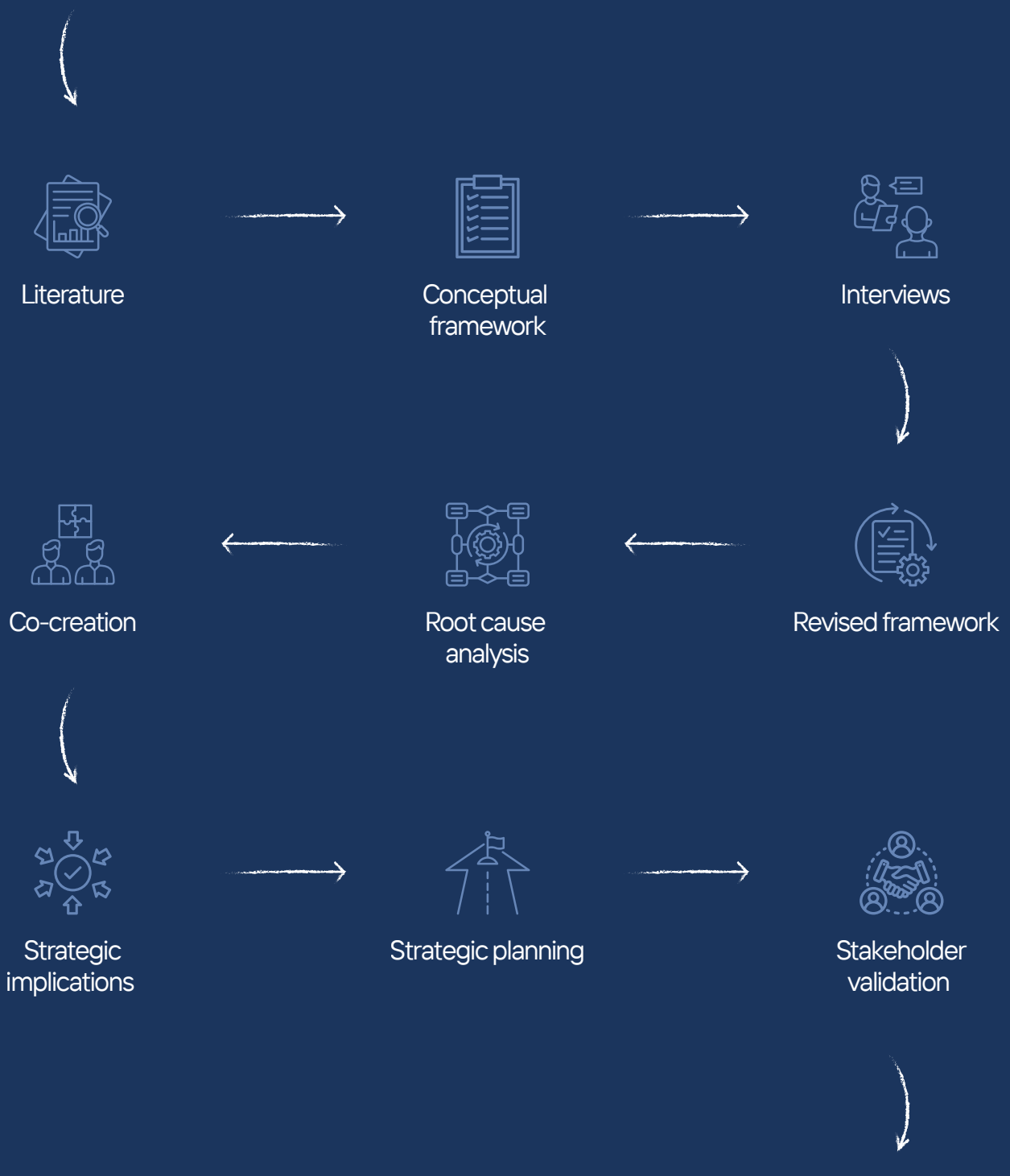
Abbreviations

CM	Change Management
M&A	Merger & Acquisitions
PMI	Post-Merger Integration
SIT	Social Identity Theory
KPI	Key Performance Indicators
LT	Leadership Team
MT	Management Team

Project Approach

The process presented in figure 1 summarises and highlights the overall research process that was taken to move from initial context exploration and literature reviews towards the formulation of the final strategic recommendations and conclusions. Although the steps are presented within a linear order, this should be considered as a simplified version of the process. In reality, especially during framework creations, stakeholder input moments and the final strategic design proposition, different design methods and design thinking were applied. Providing a strong base for the empirical insights, stakeholder expectations and theoretical concepts to be iteratively translated and refined within the created framework and strategic plan. As a result, each step formed a base for the next, while new findings also sometimes reshaped earlier stages, reinforcing the human-centred and iterative nature of the study, ensuring that the final strategic plan remained closely connected to the lived reality of the integration and change implementations.

Research scope



Research conclusions

Figure 1: Research process.

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1. Introduction

Markets are known for their fast shifting characteristics, but as can be the companies operating within these market. Organisations are constantly changing, with one of their most powerful impacts being strategic moves such as mergers and acquisitions (M&A). These strategies, involving the combination or purchasing of companies, are more than just financial transactions, they are major organisational changes aimed at generating synergies, increased value, and competitive advantages (Haque, 2021; Okafor, 2019).

Despite their great potential, many M&A efforts fall short to meet their objectives, often failing to achieve the anticipated synergy and outputs, in some cases leading to declines in company value (Koi-Akrofi et al., 2016). This ongoing challenge reveals that our understanding remains incomplete of the fundamental factors that truly shape and drive the effective change implementation within these complex, high-stakes environments.

This ongoing challenge in translating strategic intent into successful implementation highlights the critical gap in our understanding what actually happens during post-merger integration (PMI). It is therefore essential to explore *'how formal organisational change efforts interact with the informal practices that employees adopt in their daily work'*.

By examining this interaction, this research aims to better understand why carefully planned integration strategies sometimes fail to deliver the expected benefits. Therefore, there is an aim to go beyond previously done analyses by introducing a new layer to change management: the role of 'bootlegging'. A significant, yet often overlooked dynamic in determining the success or failure of post-merger integration.

This research provides an understanding of the key factors leading to successful implementation during PMI. It recognises that M&A success is closely linked to effective change management, understood here as 'the process of guiding people and organisations through (large) transitions'.

Yet, traditional ways of thinking about change management often do not fully capture the complex mix of human experience, psychological safety, organisational culture, and informal behaviour that drive organisational progress during M&A. In particular, informal practices such as 'bootlegging' - employees moving away from formal procedures to get work done - may play a significant but under-recognised role in shaping integration and change implementation outcomes. The ultimate aim of this research is to provide a practical, actionable strategic advice that acknowledges the complexity of change within M&A.

1.1. A Journey of Change

M&A deals naturally cause a follow-up effect of changes across all parts of an organisation. From new leaders, reporting structures, to altered processes, systems, and even the company's basic identity, the amount of change is not likely to go by unnoticed. Employees, who are essential for successful change implementation, face new realities, often feeling uncertain, anxious, and a loss of sense (Nahavandi & Malekzadeh, 1988; Weber et al., 2012). Their responses to the changes are varied, which are shaped by a complex mix of individual perceptions, group dynamics, and the broader organisational context (Khaw et al., 2022).

1.1.1. Managing change

At its base, change management is about enabling individuals to adapt to new ways of working. It involves planning, communicating, supporting, and reinforcing changes to make sure they last. Armenakis and Harris (1993), for example, point to clear leadership communication and commitment as key drivers for employees' readiness for change. In the M&A context, this means actively managing the shift from two separate entities to one single, combined organisation. It includes securing employee input, ensuring a clear understanding of the rationale behind the changes, and providing employees with the necessary skills and confidence to embrace the new future. Without effective change management, even strategically well-planned M&A deals could face significant struggles, often leading to higher failure rates (Koi-Akrofi et al., 2016).

1.1.2. Navigating through different cultures

One of the most studied reasons for M&A failure is the conflict between organisational cultures. An organisational culture reflects 'the pattern of shared basic assumptions learned by a group as it solves its problems by external adaptation and internal integration' (Schein, 2010). When different organisational cultures meet, there is a high chance of friction. Cintron (2020) highlighted that incompatible cultures could lead to lower productivity and higher employee turnover. Employees, who often strongly identify with their original organisation, might see the incoming culture as a threat to who they are and desire to be in the company (Ashforth & Mael, 1989; Hogg et al., 2023). This feeling of being threatened can appear as resistance, which is often misunderstood as simply being against something. However, resistance to change is much more complex than that. It could reflect valid concerns, mixed feelings, or a desire for deeper understanding rather than directly 'blocking' the change (Ford et al., 2008; Piderit, 2000). Employees may feel torn between their legacy identity and the new organisational expectations, which can reinforce an 'us vs. them' mentality instead of a shared, integrated culture.

Additionally, the success of change also depends on employee readiness for organisational change (Armenakis & Harris, 1993). This involves not just accepting the change but also believing in one's ability to handle it and seeing the change as fair and beneficial. How employees perceive fairness in outcomes, procedures and interactions, significantly shape their attitudes and behaviours during M&A change implementations (Bansal, 2019). If employees feel the integration process to be unfair, their engagement tends to drop, creating an increase in resistance.

1.1.3. Overcoming organisational fragmentation

As literature suggests, between 50-70% of mergers fail to achieve their intended objectives, often due to difficulties during post-merger integration (Marks & Mirvis, 2001). One of these difficulties is the presence of fragmentation, referred to as 'silos'. Silos are often described as invisible walls between departments that prevent teamwork and knowledge sharing (Bento et al., 2020; De Waal et al., 2019). Jeske & Olsen (2024) explain that silo mentality shows up as a reluctance to share information or resources. In M&A, existing silos within each merged company could be combined to create even bigger barriers, blocking important information and preventing the merged company from gaining the desired synergies and benefits. Effective knowledge sharing, which is crucial for new ideas (Helmy et al., 2023; Yeboah, 2023), therefore becomes a significant struggle in such environments. If fragmentation is not addressed, the intended synergies of the merger remain theoretical rather than realised in daily operations. Understanding how formal integration efforts influence, and are influenced by these fragmented structures and informal networks is therefore of key importance.

1.1.4. The importance of psychological safety

A key element for navigating these complex organisational, human and cultural dynamics is the concept of 'psychological safety' (Edmondson, 1999; Newman et al., 2017). Edmondson (1999) defined psychological safety as 'a shared belief that the team is safe for (inter)personal risk taking.' Meaning that individuals would not be punished or humiliated for sharing ideas, asking questions, raising concerns, and admitting mistakes. In M&A, where there is a lot of uncertainty and strong emotions, creating and ensuring psychological safety is essential for encouraging and guaranteeing open communication, addressing worries, promoting learning from mistakes, and ultimately, building trust between groups that were previously separate. Without this perceived safety, valuable insights remain unshared, problems may quietly worsen, and the integration process could be filled with hidden challenges.

1.2. Beyond the Formal Rules: 'Bootlegging'

While most research on M&A focuses on official structures, strategies, and formal change management processes, this research introduces a critical, yet often overlooked new dimension: 'bootlegging'. Historically, bootlegging in an organisational context refers to 'unauthorised or unofficial work activities undertaken by employees, often outside their defined roles and responsibilities, without formal approval or resources' (Mainemelis, 2010). Mainemelis (2010) describes bootlegging as 'creative deviance' highlighting its potential to challenge existing norms and generate new ideas. These 'underground' or informal practices are often driven by an employee's personal passion or belief in an idea. While sometimes viewed with skepticism or seen as rebellious, research shows that bootlegging can be a significant source of creativity and new innovations (Globocnik et al., 2022; Zhao et al., 2025).

During the turbulent time after a M&A, formal processes, systems, and resources are often under pressure. Employees may find that official procedures are slow, incomplete, or unfit for the practical realities of their work (Cintron, 2020). In response, they may create informal paths, tools, and routines that happen parallel or even partially replace the formal system (Globocnik et al., 2022). These bootlegging activities are not necessarily with negative intent, rather, they often aim to keep operations running smoothly when formal mechanisms do not seem to do so (Mainemelis, 2010; Criscuolo et al., 2013).

However, the same informal practices that help people cope in the short term can also create blind spots for management. As bootlegging remains largely invisible in formal reporting, leaders may overestimate how well integration and change implementation is progressing, ultimately underestimating the hidden efforts required to make things work. This research therefore treats bootlegging as both a survival mechanism and a potential barrier to achieving the intended integration and synergy goals. How much these informal practices are recognised, tolerated, or stopped may greatly influence the successfulness of the change implementation(s).

1.3. The Research Gap

The novelty of this research derives from directly including bootlegging in the discussion of M&A integration and change implementation. While bootlegging is starting to become a more known phenomenon, it has mainly been studied in innovation. Its role in major company changes, like M&A, especially in understanding what makes change successful, has not been widely explored. While post-merger integration has been widely explored, the role of informal employee initiatives such as bootlegging in supporting integration processes remains largely under explored (Criscuolo et al., 2013). Existing research has largely focused on factors such as cultural integration (Weber & Tarba, 2012) and resistance (Piderit, 2000), often considering informal activities but rarely linking them explicitly to PMI experiences and outcomes. The gap of this research can therefore be seen as exploring and understanding how these established, formal factors interact with informal, bootlegging factors during these disruptive times.

This research aims to fill this research gap by offering a new view on how informal employee initiatives could either help or hinder formal change implementation efforts. With this view, the research seeks to understand if bootlegging acts as a crucial, adaptive mechanism that fills unexpected shortcomings during change implementations, as well as whether it adds another layer of complexity that formal change management should acknowledge or handle. By identifying and analysing established formal factors known to influence change implementation success in M&A, and by introducing an informal bootlegging perspective as a novel layer to these factors, the research aims to explore the complex relationships and potential interactions between the two. By adding the bootlegging perspective, a more complete picture of M&A success circumstances and influential factors can be sketched, adding to potentially higher success rates.

1.3.1. Research problem

The high failure rates of M&A activities indicate a clear research problem: despite deliberate research on change management, organisational culture, and M&A implementation, there remains an incomplete understanding of the precise interplay of formal and informal dynamics that determine the degree of successful change implementation within these contexts. In this research, formal factors are understood as the organisational designed structures, processes, and change management practices through which decision-makers aim to guide the integration, such as integration plans, communication routines, and defined roles and responsibilities. Many studies with corresponding models often emphasise leadership and structural integration, however, they may not fully capture the details, behaviours, and sometimes unofficial actions that hold local practices together and shape the lived reality of employees. This research therefore addresses the problem by explicitly examining *how formal organisational change efforts and informal, bootlegging practices interact, and how this interaction influences both the perceived and actual success of PMI.*

Essentially, the success of M&A does not depend solely on strategic decisions made by leaders, but also on how employees interpret and enact these decisions in their everyday work (Armenakis & Harris, 1993). This research therefore positions bootlegging and related informal practices as central to understanding why some integration efforts appear successful on paper but struggle in practice. This approach is two-sided: academically, it contributes to the literature on M&A, change management, and organisational behaviour by integrating the explored concept of bootlegging into the framework of successful change. Practically, it provides a basis for actionable strategic advice for executives and managers on how to manage informal processes parallel to formal ones to improve the likelihood of achieving the intended synergies and output. By doing so, this research contributes to a more in-depth and complete picture on PMI and (M&A) change implementations, in which formal organisational change efforts and informal practices are seen as intertwined rather than separate.

1.3.2. Research question

To address the research question, which is shown on the next page, the following sub-questions were used to guide this research:

- *How are formal organisational change efforts designed and experienced during PMI?*
- *How do informal practices, emerge and manifest in response to the formal practices and efforts during PMI?*
- *What does the interaction between formal change efforts and informal practices imply for the realisation of integration goals and anticipated synergies?*

Together, these questions connect the strategic ambitions of the merger with the lived reality of employees, creating a foundation for the strategic design recommendations presented in later chapters.

“

How do *formal* organisational change efforts interact with *informal practices* during post-merger integration (PMI), and what does this interaction *imply for achieving integration goals and anticipated synergies?*

Research question

”

2. Case Introduction

The case study focuses on the integration of two organisations operating within the same industry. Prior to the merger, both organisations had established positions within their respective markets but differed in organisational structure, culture, and operational processes. These differences created both opportunities and challenges during the post-merger integration process. The combined organisation will be referred to throughout this research as 'the case company' to maintain anonymity while keeping the description clear and readable.

The case study offers a real-world perspective, showing how ideas on later developed theoretical insights and framework play out during a post-merger integration phase, making theories more practical and ultimately uncovering challenges and successes that would otherwise face the risk of being neglected or overlooked. By placing the research in a concrete organisational context, the study connects abstract concepts such as psychological safety, friction, and bootlegging to tangible day-to-day experiences of employees.

The case company provided the ideal setting to explore the principle of bootlegging. In the challenging post-merger environment it was challenged with, informal initiatives often emerge as employees adapt or innovate. This real-life context is essential for understanding bootlegging behaviours and their role in change management. The empirical insights from the case company form the foundation for the later analysis and design recommendations, presenting how formal and informal dynamics interact during PMI.

So, what do we see as the case company? What is their situation? What has changed? And what are their struggles that represented this research gap? The following section introduces the organisational setting of the case company and outlines how two previously independent companies became one integrated entity.

2.1. Organisational Background

Different organisations have struggled with some finding 'their way'. This research is aimed to provide insights on how to do so for the case company at hand.

The organisation examined in this thesis is part of a larger group of companies that are presented within the overarching group. As can be seen in Figure 2. Even though they are part of a larger group, they are represented within a certain 'sector'. The group recently acquired two independent companies and initiated a strategic effort to merge them into one combined organisation: the case company. Prior to the acquisition, these companies operated entirely separate, had distinct organisational structures, and developed their own working routines over time. The merger, therefore brought together entities with different cultures, leadership expectations, and approaches to daily work. Understanding the context in which this integration was developed is essential for understanding how change is interpreted, implemented, and experienced within the organisation. In this research, the larger corporate parent is referred to as the 'overarching group', where the two legacy companies that formed the case company are referred to as 'entity A' and 'entity B'.

2.1.1. The idea of a new, united company (group)

For the purpose of this research, the strategic intention behind the merger is summarised as creating a more coherent and scalable organisation that could make activities lean, share knowledge across sites, and realise synergy gains in everyday practices and market reach. This intent was presented through a holistic integration roadmap to the case company's different hierarchical levels as well as to their distributors and other companies represented within overarching group. The goal: creating shorter lines, a larger market share and specialisation in-house. A goal that is common among M&A integrations.

2.1.2. Pre-integration

Before joining the overarching group, the larger entity operated with a multi-departmental structure reflecting its broader scale and international activities. Departments included commercial, technical, operational, and administrative support, each with dedicated managers and several layers of reporting. Decision-making was relatively centralised, and processes were documented and supported by existing corporate structures. Collaboration was organised through formal meetings and channels, where responsibilities were distributed across specialised teams and individuals. The organisational structure reflected a clear division of tasks, with numerous employees working within functionally distinct units.

The smaller entity, in contrast, functioned as a compact organisation with limited resources and staff represented within a more 'flat' organisational structure. Roles were often broader and more flexible, with employees combining operational tasks with immediate problem-solving responsibilities. Due to its size, communication structures were more informal, and employees relied strongly on direct contact and personal initiative. This created a working environment and culture of high individual visibility, strong task ownership, and fast adjustments in response to practical challenges.

The pre-integration differences in scale, hierarchy, and everyday routines formed the foundation on which the integration process unfolded. The following sections describe how the overarching group initiated the merger and how employees at the case company experienced the early stages of becoming one company.

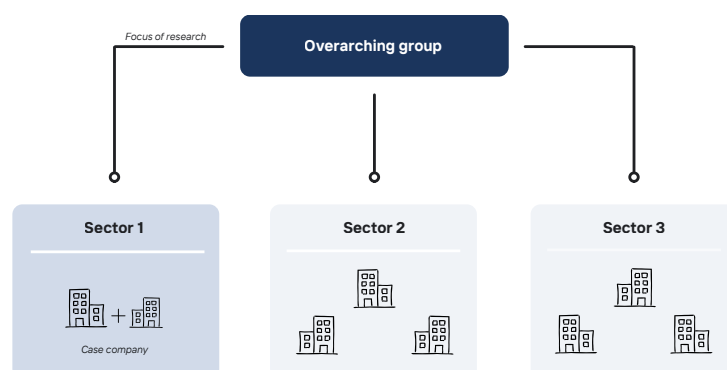


Figure 2: Case company structure.

2.2. The Integration Process

Following the acquisition, the overarching group directed the integration of both entities, designating the larger organisation as the structural and operational foundation into which the smaller organisation would merge (see Figure 3). This decision did not originate from within either organisation, instead, it represented a strategic aim to streamline activities, synergise systems, and create a more cohesive organisational structure across, in this case, the group sector.

The integration was therefore introduced as a top-down implementation. Employees across both entities became aware that substantial changes were approaching, even when specific plans were still evolving. For many, the sense of external pressure contributed to heightened self-awareness regarding to their roles, responsibilities, and future position within the merged organisation. The employees of the larger organisation anticipated increased complexity and additional coordination tasks, whereas employees from the smaller organisation faced the need for adaption to a more formal, layered organisational environment. In practice, this meant that staff from all hierarchical levels were expected to align with a new structural logic, even when the concrete implications for their day-to-day work were not yet fully defined.

These developments highlight how the integration was not only a structural change, but also an impact on human and cultural elements, in which expectations, identities, and responsibilities had to be reconsidered across both entities.

2.3. Early Integration Challenges

As the integration unfolded step-by-step, employees encountered several challenges that influenced their ability to engage with the change. Communication about the process changed over time, and the details of future structures were not always fully defined or up-to-date. This contributed to uncertainty about priorities, responsibilities, and the pace at which change would occur, which changes would occur and its implementation time. Employees often interpreted information by relying on their understanding of past routines and exchanges with colleagues. In this early phase, informal conversations and assumptions frequently filled the gaps left by incomplete or delayed formal communication.

Differences in work practices between the two entities were visible when teams began collaborating. Employees from the smaller entity, had to adjust to multi-layered reporting structures and clearer departmental boundaries. Employees from the larger entity, in turn, needed to integrate colleagues with different expectations and working habits and expertise while maintaining ongoing operational output. This sometimes led to misunderstandings about who was responsible for what, and which standards or procedures should be followed, especially when practices through experience conflicted with newly introduced formats.

Resource constraints played a role in shaping these experiences. The smaller entity's limited staff and roles made it difficult to engage fully with integration activities without affecting daily work. At the same time, the larger entity had to absorb additional responsibilities, often without increases in resource capacity. This combination made the integration challenging and created pressure to balance operational continuity with the expectations of the overarching group, but also of the employees themselves. Under these conditions, informal practices and adaptive behaviours started to appear as employees tried to keep operations running while dealing with changing priorities and sometimes unclear boundaries. This case provides a valuable context to examine how informal employee initiatives, such as bootlegging, may influence organisational change during post-merger integration.

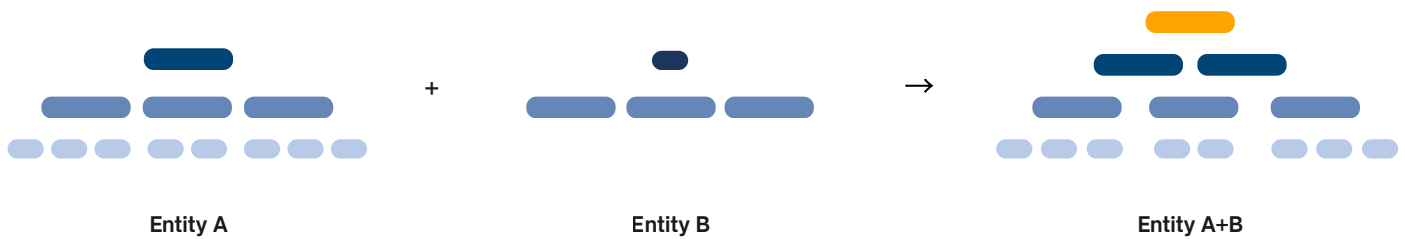


Figure 3: Entity structure pre and post merger.

2.4. Academic Relevance of the Case

The integration context of the case company offers valuable insights into the dynamics of change implementation in organisations undergoing mergers or acquisitions. A key insight and challenge that can be retrieved is the distinction between formally planned integration and the actual experiences of employees. While group-level strategy showed a structural plan for synthesis, employees experienced the integration as a series of evolving changes and expectations accompanied by uncertainty and operational pressure. This difference shows how integration processes are often experienced differently within practice than what was expected within the planned documents. In other words, the 'official' integration strategy and the lived reality of employees did not always align.

Furthermore, the integration brought different parallel or even intertwined changes. The stacking of these changes increased the risk of overload and affected the pace of implementation. Communication gaps, especially within the early stages, led to varied interpretations of the change process. Employees filled missing information with their own assumptions or from informal conversations, which influenced how they prioritised tasks and understood the purpose of the integration and change implementation. Such dynamics show how informal sense-making processes can either support or complicate the intended direction of formal change efforts.

For academic research, the case company demonstrates why studying change implementation requires attention to how employees interpret, negotiate, and adapt to new expectations. Change does not occur only through formal activities, it is shaped through everyday practices, informal adaptations, and employees' sense-making processes. All of these dynamics influence and explain why change initiatives succeed in some areas, or could hinder the integration and implementation in ways that were not originally expected.

Part 1: Theory

3. Theoretical Background

This chapter provides the essential ideas and concepts needed to understand the complex changes occurring within organisations. The main aim of this chapter is to explore fundamental theories and highlight the crucial factors that shape how these changes unfold. This detailed overview will later serve as base for the development of a theoretical framework which will be discussed in Chapter 4. For more understanding on the literature review procedure, see Appendix 3.

First, more insights will be provided on the principle of change management, covering its core principles, approaches, and importance for successful change implementation. Following this, more details will be provided on the various factors influencing the success of change management. It is important to recognise that successful change rarely happens in isolation, instead, it emerges from a careful balance of many interacting forces.

Next, the 'new' bootlegging perspective will be introduced. This section will go beyond the official, planned ways of how change is managed, looking instead at the informal, often unofficial projects or ideas that naturally emerge during change. These hidden efforts can surprisingly impact how well an organisation adapts and innovates when things are uncertain or changing.

Finally, the research context will be presented: the demanding and difficult-to-handle phenomenon of mergers and acquisitions (M&A). M&A represent a highly intensive form of organisational change, involving different integration procedures and responses, making it an excellent setting to observe both formal and informal change initiatives and their influential factors.

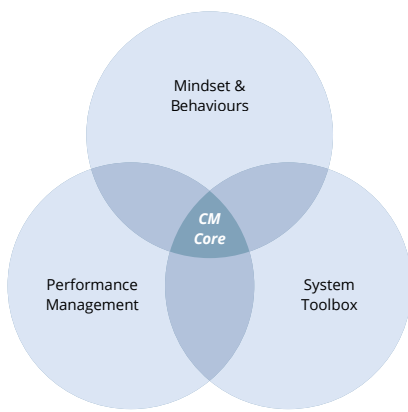


Figure 4: Organisational CM building blocks.

3.1. Change Management

3.1.1. Why change occurs in companies

Imagine a company like a living thing, it constantly needs to adapt in order to grow. Today's businesses and markets are constantly changing. New technologies are created, customers desire different things, and companies have to keep up with competitors from all around the globe (Khaw et al., 2022). This results in companies having to change how they do things. This change is not just about new rules or tools, it is about shifting how people work and think (Ford et al., 2008).

Consider for example the merging of two companies, this would come with a lot of consequential implementations. It would mean bringing together different ways of working, different cultures, and often different people (Asaoka, 2019; Haque, 2021). For changes to work well, companies require well established 'change management' (CM). Change management provides a guiding strategy for everyone involved to move as smoothly as possible through the change. These strategies often try to limit people's resistance to change, to ensure fluent change implementation and its new way of doing things (Armenakis & Harris, 1993; Khaw et al., 2022). In the M&A context in which this research is set, change management is therefore not an abstract concept but a practical need for translating strategic integration plans into daily workable practices.

3.1.2. Managing change

Managing change is not just about telling people what is new. It is about considering the whole picture: how people think, what they do, what is expected of them, and the tools and systems they use before, during, and after the change. Figure 4 illustrates this by showing how mindset and behaviours, performance management, and system tools interact as overlapping aspects that together shape the success of change implementations.

- **Mindset and behaviours: how people think and behave**

This part considers the psychological side of change. It considers how people's attitudes, their beliefs, and their usual habits (Duhigg, 2012). For a change to be sustainable, employees need to understand what the change means for them, believe that it is worth it, and feel ready to change their own behaviour to support the overall goal of the organisation. Sometimes, this means pushing people out of their comfort zones for the overall good of the company (Kahneman & Tversky, 1979). Helping people see challenges as chances to learn, what is called a 'growth mindset', is what is important and aimed for (Dweck, 1988). In PMI settings, this means employees must not only accept new structures but also consider their identities and daily routines in relation to a new reality.

- **Performance management: what is expected of people**

This part focuses on setting clear goals, providing feedback, and checking how well people are doing with the new changes. It makes sure everyone understands their new tasks and receives the help they need to meet new targets. It also involves acknowledgements when people are doing well with the change implementation (Bandura & Walters, 1977). It helps to see whether change is working or not, and what should be adjusted so people could perform better in their roles (Ford et al., 2008). In the context of PMI, performance indicators are often linked to integration targets, however to cover all layers of the 'performance' remains difficult.

- **System lean toolbox: the tools and systems**

This aspect refers to actions and tools that support the change, such as new processes, digital systems, or ways of working like lean or structured approaches. These tools help to structure the change in a clear way. Providing good training is key here. People require to know how to use the (new) systems and tools, even if they do not prefer to do so right away (Bandura & Walters, 1977). This 'toolbox' also includes the different methods and steps used to plan, carry out and track the change. When tools are poorly aligned with reality, they could hinder rather than support change.

These three different parts are strongly connected. If one part is changed, it will have a direct affect on the other two. Therefore, managing change means considering and looking at everything together in a smart, planned way.

3.1.3. How company culture and group identity shape change

The culture of a company, its shared values, beliefs, and usual ways of doing things, have a huge impact on how new changes are seen and put into action (Aichouche et al., 2022; Schein, 2010). It can either make change implementations easier or make them more difficult.

A company's culture acts like its personality (Hofstede, 2011; Schein, 2010). It provides the base for how people work and how they respond to new things. If a new change would be considered for implementation, initiators have to consider how much and in which way the change would impact the people. It is hard to change or add new ways of working when old habits are still strong.

This is also the case with merging companies. Getting the different cultures to work together is a huge challenge. If cultures clash, it can often lead to problems and failure (Cintron, 2020; Smeulders et al., 2023; Weber & Tarba, 2012). Different cultures could create 'silos', when different departments or teams do not talk to each other or avoid sharing information, creating an additional challenge on the actual implementation (Bento et al., 2020; De Waal et al., 2019; Jeske & Olsen, 2024; Helmy et al., 2023; Yeboah, 2023).

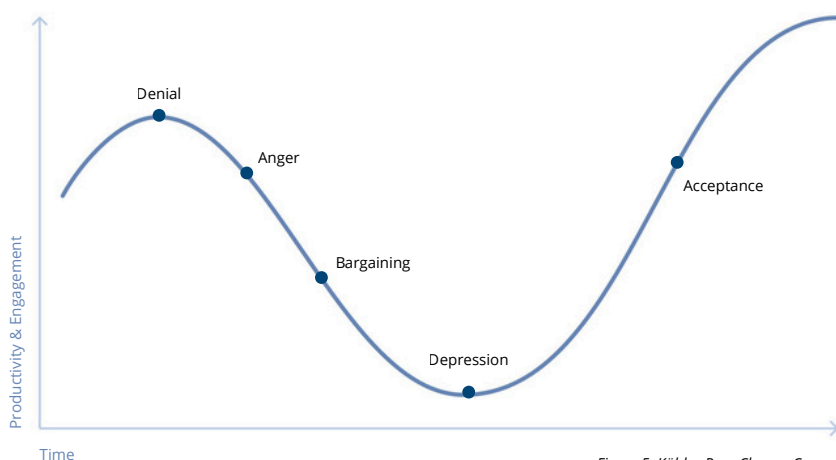


Figure 5: Kübler-Ross Change Curve.

3.1.4. How people respond to change

To manage change well, it is important to understand how people, as individuals, respond to such events. Change often brings out many different feelings. In order to present a more detailed understanding of these responses, the models of Kübler-Ross 'Change Curve' and Rogers's 'Innovation adoption curve' will be introduced. For the research, these models are not used as fixed stages that every employee passes through, but as analytical tools to interpret the emotional and behavioural patterns that appeared during the case company's PMI.

3.1.3.1. The Kübler-Ross Change Curve (DABDA)

This model was first used to describe how people deal with large change like grief. However, it is very useful for understanding how people react to large changes in general, therefore also when dealing with changes in M&A PMI (Kübler-Ross, 1969). It is important to remember that people do not always go through these stages in the consequential order, and might even go back and forth between the stages.

The stages of dealing with deep change are: (see Figure 5)

1. **Denial:** at first, people might not want to believe the change is real or that it will affect them. They might try to stick to the old ways or simply ignore the change.
2. **Anger:** once the reality of the change has sunk in, people might feel frustrated, upset, or angry. This anger could be aimed at the change itself, the people making the changes, or just the feeling of losing control.
3. **Bargaining:** people might try to find ways to avoid the full impact of the change. They might try to negotiate or suggest different ideas to go back to what they know.
4. **Depression:** feelings of sadness, uncertainty, or loss can come up as people realise the change is happening and cannot be stopped. They might feel down about losing their old routines, roles, or even their professional identity.
5. **Acceptance:** this is the final stage, where people start to come to terms with the new situation. They begin to understand and adapt to the changes, finding ways to work with them in their daily jobs and their perspective and vision.



Figure 6: Rogers' adoption curve (Rogers, 1983).

In the context of this research, the Kübler-Ross curve helps to interpret future raw data based on their themes and the understanding that not every response might hold the same message. People responsible for change implementation should be aware of these feelings and offer support, clear messages, and understanding throughout the change process. This would help people move towards acceptance more smoothly (Khaw et al., 2022). If not, negative emotional states could reduce people's capacity to engage in formal change initiatives, while acceptance can provide space for participation or more informal responses.

3.1.3.2. Change readiness and acceptance

How 'ready' someone is for change plays a large part in how they will react. People could be helped with their readiness through explanation on why the change is needed, and what value(s) it holds for them, helping them feel capable of handling new tasks, and making sure they feel supported (Armenakis & Harris, 1993).

It is natural for people to resist change. Often, this derives from a fear of the unknown, worries about losing their position, or just not wanting to break old habits (Ford et al., 2008). However, resistance is not always bad! It has shown that people who are unsure could even be a useful feedback mechanism that could improve the change implementation (Piderit, 2000). Therefore, instead of ignoring 'resistance', it is important to understand why people may not be accepting the change and help them get through it.

3.1.3.3. How new ideas spread

Implementing change in organisations is not far different from how a new product or idea spreads through a group of people. This phenomenon can be explained through the so-called 'diffusion of innovation' theory from Rogers (1983). It helps to understand that not everyone accepts change at the same time or in the same way. People tend to fall into different groups based on how quickly they adopt new things. The different groups are explained within Rogers's (1983) adoption curve as: (see Figure 6)

1. **Innovators:** people that are first to jump into new ideas. They prefer a challenge, try new things, and take risks. This is the smallest group.
2. **Early adopters:** these people are leaders in their social circles. They try new things early but are a bit more hesitant than innovators. They are important as when they adopt change, others are more likely to follow.
3. **Early majority:** these are thoughtful people who adopt new ideas just before most others. They need to see evidence that the change would actually work.
4. **Late majority:** this group is more doubtful and traditional. They adopt changes only after most other people have already accepted them and they have seen the additional benefit, or have seen it work.
5. **Laggards:** these are the last ones to accept change. They often value tradition and are very resistant. They might only change when they absolutely need to, or when the new way has become the only way.

Knowing these groups helps change initiators plan how to talk about and implement the change. They could try to identify the 'early adopters' to 'lead' the change and use different ways to convince the later groups. Roger's model is particularly interesting to interpret why certain employees in the case company responded and accepted change quickly, whereas others had more difficulty to do so.

3.1.5. Who we are

People often get a sense of who they are and where they belong from the groups they are part of, whether it is their work team or department (Ashforth & Mael, 1989). During big changes, employees might feel like their team or their place in the company is being threatened. This could make them stick even more closely to their old team and resist joining the new change implementations (Hogg et al., 2023). A key part of successful change is breaking down these 'silos' and helping everyone feel like they belong within the scenario in which this change is existing (De Waal et al., 2019).

3.1.6. Making change a smooth ride

Several elements help to implement change initiatives more smoothly. These elements are considered both as formal drivers of change as conditions that can either stimulate or challenge the progress.

3.1.6.1. Open communication and training

Communicating clearly and consistently is crucial before, during, and after change. It helps to minimise worries, answer potential questions, and explains why the change is supposed to happen, happening, or desired to happen. Training could be a mediator in this as it teaches people how to use the new tools, understand the new ways of working, and know what to expect of them (Bandura & Walters, 1977). While does not mean everyone will have a positive attitude towards the changes at first, it does provide them with the skills they need to deal with the them and their environment.

3.1.6.2. Feeling safe to speak up

Psychological safety' means that people feel comfortable taking risks, like sharing new ideas, asking questions, or pointing out mistakes, without being afraid of getting in trouble or looking bad (Edmondson, 1999; Newman et al., 2017). This feeling of trust is extremely important when things are changing. When people feel safe, they are more likely to get involved, give honest feedback, and help find solutions. Interesting enough, a safe environment can also encourage the phenomenon of 'bootlegging', which will be explained later on in this chapter.

3.1.7. Conclusion on change management

Managing change is not just a simple task, it rather is a complicated and crucial process for any company that desires to survive and grow. By understanding how people react emotionally, how new ideas spread, how company culture and group identity play a role, and by using clear communication, sufficient training, and creating a safe space for people to speak up, companies are expected to handle changes much better.

From an academic perspective, this chapter shows that formal change management theories already acknowledge many of the human and social processes. However, the empirical findings retrieved from the literature suggest that these processes do not always unfold within formal structures alone. When companies focus on changing mindsets, setting clear expectations and providing people with the right tools, they build a strong foundation for successful change implementation, allowing them to not just deal with change, but to truly immerse and take next steps in their next strategic plan.

3.2. Organisational Change during M&A

To understand successful organisational change implementation, it is essential to examine the factors that determine the success or failure of the change process itself. While implementing change can be challenging, various aspects influence the potential for successful implementation. Based on extensive literature research (see Appendix 3), influences were clustered, from which four overarching categories were identified: organisational, social, human, and cultural. These categories have been based on insights from various sources and are structured in such a way to cover the core influential aspects of change implementation, while also considering their relevance and impacts.

3.2.1. Organisational influences

Successfully implementing change within an organisation involves much more than just strategic plans and resource allocation. It is about how people, teams, and the entire organisation work together. This part will explain the first important category: organisation, detailing what is meant by the 'organisation' category in the context of change. It will cover how different organisational factors play a key role in managing changes and discuss the key organisational aspects that are of key importance when it comes to handling these changes.

3.2.1.1. Defining 'organisation'

An 'organisation' is essentially a group of people working together in a structured way to achieve common goals. This includes the clear, formal parts like job titles, departments, rules, and operational systems. However, it also includes the less obvious, yet impactful elements, such as organisational culture (how things are done around here), how leaders guide their employees, and how people talk and work with each other (Schein, 2010). An organisation is always changing, shaped by its past, external influences, and the shared habits and beliefs of its employees (Duhigg, 2012). When an organisation undergoes significant change, their unique organisational style becomes relevant. This can lead to great teamwork or could bring significant challenges to the change process.

3.2.1.2. How organisational influences shape change

The 'organisational' category refers to all the internal factors within a company that affect how easily and effectively new systems, ways of working, and company cultures theoretically could be integrated (Bansal, 2019; Cintron 2020; Smeulders et al., 2023). This includes every element from the company's structure and how people (in this case internally) communicate to how resources are shared, and the overall company culture.

These elements, when considered broadly, determine if the evolving company can adjust, adapt, and succeed after implementing change (Smeulders et al., 2023). It shows a complete picture acknowledging how a company is set up, how it is managed, and how its people interact. All these aspects are crucial for making change implementation work. If these deep organisational realities are ignored, or undermined, they could cause a lot of problems and stop the change initiative from reaching its goals (Koi-Akrofi et al., 2016).

3.2.1.3. Organisational management of change

Successfully managing change relies on carefully considering several connected organisational areas. These areas, though different, together create the environment for change and strongly influence how employees react and how well the implementation of change will play out (Khaw et al., 2022).

A first crucial area is leadership connected to a clear vision and mission. 'Good' leadership, especially when it clearly and consistently shares a strong vision for the change, is extremely important (Cintron, 2020). Leaders are key in getting everyone on board and making sure that enough resources are available to support the implementation efforts (Bansal, 2019; Smeulders et al., 2023). After all, it is the leaders' responsibility to set clear goals and create systems that encourage cooperation and break down existing 'silos', the so-called 'isolated' groups within a company (De Waal et al., 2019). If the initiated change vision is not clear or if leaders fail to commit to the set vision, it could cause employees to resist, making it harder to move forward (Piderit, 2000).

Another, important area of organisational factors involve how the company is structured and how it operates. This includes the main company culture, which greatly affects how people interact, make decisions, and respond to changes (Okafor, 2019; Schein, 2010). If a company which is undergoing change has distinct internal cultures or subcultures, it has a higher potential of friction and creation of silos, which negatively influences change management, and the sharing of information and knowledge (Aichouche et al., 2022).

Additionally, how flexible the organisational structure is and how well it can coordinate its efforts, is considered to be key for organisations expected to face large changes within their existing structures (Okafor, 2019). The flexibility is needed to facilitate knowledge sharing, collaboration, and cooperation among different organisational levels (De Waal et al., 2019; Yeboah, 2023). Besides the internal structures, it is important to acknowledge external influences that could alter the organisational structure, such as national culture, which could have a large impact on basic organisational values and 'how things are done' (Hofstede, 2011; Weber & Tarba, 2012).

Finally, how people interact and communicate (considered from a top-level perception) within the organisation are necessary for a successful implementation. Getting employees involved and providing them with the power to make decisions are a fundamental aspect for them to accept and participate in the change (Cintron, 2020). Efforts to break down silos are needed to encourage teamwork across different functions and to reduce the negative effects of groups working in isolation (Bento et al., 2020; De Waal et al., 2019). A shared mindset of working together and a culture that values collective learning provides a required base for sharing knowledge and collaboration within the top-down organisational changes (Helmy et al., 2023). Adding to this, clear and honest communication builds trust in top-layers and reduces uncertainty, limiting potential fear and resistance or negative responses towards the changes (Bansal, 2019; Cintron, 2020). Good communication should therefore always be two-sided, with opportunities for discussion and feedback, resulting in limited misunderstandings and concerns to be addressed early on (De Waal et al., 2019; Jeske & Olsen, 2024). Facilitating communication avoids problems and further silo formation (Haque, 2021). With this, providing 'psychological safety is key, in this way employees will feel 'safe' to share concerns and provide feedback without the fear of negative consequences. Only then, open and truthful bottom-up communication can be guaranteed (Edmondson, 1999; Newman et al., 2017).

To conclude, the organisational factors influencing change, are complex and intertwined. Successful change management is not just a technical, top-down task, it is deeply focused on different dynamics. It requires a complete understanding and smart handling of leadership, company structure and cultures, and the execution of interaction and communication. Failing to properly address these organisational aspects could seriously damage the overall success of the M&A integration and change implementation (Khaw et al., 2022).

3.2.2. Social influences

Next, we dive into the second category: 'social'. The social category is a critical, yet frequently underestimated group of factors influencing the successfulness of change processes. 'Social' describes the complex network of human interactions, shared behaviours, and cultural elements that naturally arise when different (groups of) people come together. It focuses on more than individuals alone and highlights how people interact, form groups, and influence each other (Hogg et al., 2023). The social category is about how people connect, talk to each other, and ultimately experience and adjust to changes that are initiated through organisational shifts. It shows that only considering organisational influences on change is not enough. It is required to gain a deeper understanding on the human dynamics influencing the integration and change.

3.2.2.1. Defining 'social'

The social category refers to all the important factors and events that can be derived from how people interact and how they see themselves as part of a group. This includes everything from how individuals identify with their teams, how relationships are built and kept, to how knowledge is shared or sometimes held back. This category emphasises that managing change is strongly connected to understanding existing social structures and the new ones are that initially being formed. It also recognises that deeply ingrained habits and norms, as well as (un)conscious decisions, all play a part in how people react to change efforts (Duhigg, 2012; Kahneman & Tversky, 1979).

3.2.2.2. How social influences shape change

During a period of change, several key social aspects stand out as particularly important for effectively managing change implementations. These areas show where human dynamics can either support or hinder the change implementation process.

One of the most important social aspects is how employees see themselves in relation to their current social groups. This involves, their sense of belonging to a team or department and the potential for an 'us vs. them' feeling to develop when different organisational subcultures meet (Hogg et al., 2023; Smeulders et al., 2023). One example one might consider is the aspect that strong loyalty to an old team decreases the openness of people to new ways of working (Khaw et al., 2022). Therefore, when initiating change, creating a shared identity that bridge these differences, should be an item on the list. This will positively motivate people's sense of belonging to the evolving organisation and reduces division (Cintron, 2020; Hogg et al., 2023).

When it comes to the nature and strength of the relationships among people, the focus should not only be on the consideration of their formal connections, but rather also the informal networks they are involved in. Trusted colleagues and so-called informal leaders could act as powerful role models, influencing how others feel or behave before, during, and after the change process (Bandura & Walters, 1977; Hogg et al., 2023). The influence of peer pressure can either speed up or slow down the acceptance of new practices, depending on what the group generally believes and perceives (Bento et al., 2020). Additionally, an individual's work experience and specific skills may affect their willingness to get involved and adapt individually as well as for the collective, even when these boundary spanning relationships, are crucial for building shared understanding and information sharing (Bansal, 2019; Helmy et al., 2023; Smeulders et al., 2023). As discussed, the different relationship structures help organisations to identify important internal players who could help with the change navigation and lower resistance in areas where they might arise.

A direct consequence of relationship structures is the increase or decrease of challenges around knowledge sharing and effective communication. The knowledge sharing culture, whether it encourages open exchange or keeps information guarded, directly impacts the pace and the precision of the change implementation and M&A integration (Aichouche et al., 2022). The way of communicating, including tone of voice and used channels, are essential for creating a clear understanding, reducing uncertainty, and keeping employees positive towards the change (Khaw et al., 2022; Yeboah, 2023). As mentioned before, a widespread silo mentality, regardless of its reason, can seriously prevent both communication and teamwork, creating structural problems that hurt change implementation efforts (De Waal et al., 2019; Jeske & Olsen, 2024). Addressing the social aspects effectively, rather than just focusing on top-down organisational influences, is key to understanding the complex dynamics influencing the change management strategy.

3.2.3. Human influences

Where there is a top-level request for change, in the end, it is the humans, in this case being the employees, that make the change. Therefore, the human category and its impact on the change progression should be seen as a valid, if not the most important category. The human category refers to all the individual traits, actions, and feelings that significantly shape how employees respond to and participate in new change initiatives and implementation. It considers more than just the organisational and social structures, it is rather about gaining a deeper understanding of people's personal attitudes, skills, motivations, and emotional responses to change (Hogg et al., 2023). Understanding the human category factors provides a strong foundation for the understanding and stimulation of change implementation success rates.

3.2.3.1. Defining 'human'

The 'human' category, concerns aspects such as: people's psychological well-being, sense of security, their drivers for actions and choices, their existing skills, training, and self-belief. These different aspects are intertwined and directly impact each other in complex ways. They cover how we think and feel, what motivates us from within and without, and the practical abilities that we have as an individual. All these together combine how someone responds to changes, making it an important category and important to understand on a detailed level. In the end, employee resistance or in general negative attitude towards the change, which often derives from these different human factors is a main reason why changes are not achieving their fullest potential (Ford et al., 2008; Piderit, 2000; Smeulders et al., 2023). If these human considerations are neglected, or not identified properly, they could cause employee disengagement, lower productivity, and consequently, a failure to achieve the benefits expected from the change initiative (Nahavandi & Malekzadeh, 1988; Weber & Tarba, 2012).

3.2.3.2. How human influences shape change

There are different human influences that could be considered 'key' to successful change management. These aspects require strict attention and accuracy for a smooth change implementation, in this case M&A integration.

A first key area within the human category focuses on how people feel mentally and how they experience their sense of safety. The human thoughts and emotions, are what guides them in how they deal with stress, uncertainty, and emotional challenges that naturally occur during change. A basic human need for security, especially when people feel unsure about themselves, should be considered as a central driving force (Yeboah, 2023).

Besides people's feelings and experiences, it is something completely else to consider what drives them and how they act. This concerns understanding individual's inner motivations and the impact of outside influences on their decisions and experience of safety to speak up (Newman et al., 2017).

Intrinsic motivation, which comes from a sense of meaning and purpose, positively affects how people share knowledge and engage (Yeboah, 2023). In contrast, extrinsic motivation (incentives and rewards), though it can influence behaviour, should be carefully reviewed on their impacts (Bento et al., 2020). How much people feel empowered and take ownership of the change can reduce negative attitudes, resistance and boost individual as well as indirectly group performance (Bento et al., 2020). Resulting in potential positive effects on the individual's willingness to voice their opinions and participate actively and effectively.

Finally, there is an important element of human skills, training, and confidence on the practical abilities that people have within the change environment. These factors influence human perception and form their experience and perspective on whether to see the change as a threat or opportunity (Hogg et al., 2023). Connected to the human skills and training, perceived control and confidence play a crucial role on this human perception and behaviour as well. Mental models like the 'endowment effect', valuing something you 'own' as more than something you do not 'own', make people resistant or more assertive to changes (Asaoka, 2019; Kahneman & Tversky, 1979). Therefore, effective training and skill building are essential to provide employees with the necessary tools for new processes and system implementations (Bento et al., 2020; Khaw et al., 2022). Furthermore, a person's uncertainty tolerance and comfort with unknown situations holds a critical element to the human perception to change. Overconfidence can lead to mistakes, while adaptability helps navigate the often unpredictable nature of the change (Asaoka, 2019; Hofstede, 2011).

To summarise, successfully managing change requires a rational, realistic but more so human-centered approach to these complex aspects. A smooth implementation is not just about combining the organisational and social aspects but should also take a deeper dive into what is actually driving people. It is about successfully integrating people, paying careful attention to psychological safety, managing emotions, stimulating a sense of identity and control, encouraging active participation, and investing in skill development and confidence-building. In the end, these efforts help reduce the resistance and make the company able to fully tap into their human talent (Haque, 2021; Okafor, 2019). Failing to address these human factors is a significant risk that often leads to implementation failures (Koi-Akrofi et al., 2016).

3.2.4. Cultural influences

The final important category to consider when it comes to change implementation and its success rates is the cultural category. During change, understanding and effectively managing this cultural element can be the difference between a success or a failure. At its core, 'culture' within an organisation refers to the shared values, norms, beliefs, and common ways of behaving that characterise its members (Schein, 2010). It not just about explicit rules, it includes the unwritten 'how we do things here' and the deeper, often unconscious, assumptions that guide decisions and actions (Schein, 2010). For anyone involved in change management, recognising and addressing these cultural layers is absolutely fundamental.

3.2.4.1. Defining 'culture'

When discussing the 'cultural category' in the context of change management, it steps beyond the simple tangibles, like brand identity, colours, office layouts etc. Instead, the cultural category acknowledges the deeper fundamental influences that affect how an organisation operates and how its people respond to changes. This category covers the factors that determine and influence the environment in which new ideas are adopted, shape the organisation's unique characteristics, and determine its willingness to embrace new methods and structures (Cintrón, 2020).

Cultural factors differentiate from pure operational or structural issues. Cultural factors are often less visible and more deeply ingrained. They have an impact on and are impacted by critical areas from the other categories, such as trust among employees, the willingness of individuals to take risks, and organisation's overall ability to adapt to strategic shifts (Smeulders et al., 2023). Therefore, viewing change integration through a 'cultural' lens allows us to understand how shared beliefs, communication styles, and collective identities influence the complex process of implementing change.

3.2.4.2. How cultural influences shape change

Just like the earlier mentioned categories, the core factors within the cultural category, contain levels of interconnectedness, making them collectively shape the change journey.

One of the very first challenges is the assessment of cultural alignment within an organisation undergoing change. This involves considering the compatibility of established structures, everyday operational practices, and values across different parts or levels of the organisation.

When there are significant differences, a 'cultural distance' or so-called 'value misfit' is present, hindering the integration efforts (Cintron, 2020; Smeulders et al., 2023; Weber & Tarba, 2023). These misalignments lead to higher costs and prevent the organisation from achieving its requested and desired benefits and outputs (Smeulders et al., 2023).

So, what are possible misalignments? First, consider that organisations express their cultures through symbolic elements like specific behaviours, rituals, and language (Bansal, 2019). Inconsistent symbols can signal deeper internal cultural clashes and cause confusion during change implementation (Cintron, 2020).

Furthermore, as mentioned, the consideration and alignment of daily practices is essential. After all, innovating operational processes and systems to create an improved version is a common goal in change initiatives (Cintron, 2020). When everyday work habits differ significantly, rooted in visible or unconscious practices, it tends to lead to considerable friction (Duhigg, 2012; Smeulders et al., 2023). Similarly important is the integrating of the organisation's core values, which are often unconscious and deeply held, influenced by different levels (e.g. national or company-specific histories). Misaligned core values cause disagreements and negatively impact cooperation. Additionally, each existing culture within an organisation holds a crucial part of its behaviour, reasoning, operational processes, and therefore, change process (Weber & Tarba, 2012). Ignoring these inherent cultural differences negatively impact the performance of not only separate departments or groups, but indirectly the performance of the whole organisation (Koi-Akrofi et al., 2016; Newman et al., 2017; Smeulders et al., 2023). Please note that without a cultural element of trust, employees are more likely to resist change (Ford et al., 2008). As can be said for the emotional bond people might experience when it comes to cultural storytelling, which includes the shared language, company (his)story, brand identity, and values, since this is not only to be considered part of the shared identity but also the individual identity (Bansal, 2019; Cintron, 2020).

All these aspects help to create a common understanding, fostering a shared vision on the cultural situation. However, there are more crucial elements when it comes to culture. Consider for example the organisation's ability to adapt and learn, involving the willingness of an organisation to be flexible and embrace a learning-oriented mindset. Connected to this are the elements of transparency and dialogic communication, as they serve as base for stimulating positive perceptions of fairness and justice in interactions (Bansal, 2019). When communication is lacking or unclear, it can generate insecurity and fear, leading to resistance to change (Cintron, 2020; Khaw et al., 2022; Piderit, 2000).

Moreover, successful change should be viewed as an ongoing process of mutual learning and adaptation, rather than a one-time event (Cintron, 2020). This continuous learning culture allows the organisation to evolve and adjust to the new (future) change. Socialisation and learning mechanisms, such as training, applying social learning theory principles (Bandura & Walters, 1977), and actively promoting knowledge sharing, help generate this adaptive and learning culture (Aichouche et al., 2022; De Waal et al., 2019; Yeboah, 2023).

Additionally, the degree of assimilation and cultural dominance (i.e., how much one culture adopts the other, or how they blend) directly impacts the changes required from each group within an organisation to successfully implement change (Nahavandi & Malekzadeh, 1988). This aspect influences how individuals and groups view the change and its implementation process.

Finally, as mentioned before, there is an importance in cultural orientation and stimulating an adaptive organisational learning culture, as cultural dimensions like flexibility are important aspects for navigating change effectively (Hofstede, 2011). An organisation's commitment to learning is key for its long-term stability and sustainability (De Waal et al., 2019). Organisations with cultures that hold an adaptive mindset enables to respond effectively to unexpected challenges that inevitably arise during change implementations (Kahneman & Tversky, 1979).

To conclude, successfully navigating change demands a comprehensive and thoughtful approach to cultural dynamics. Recognising the explicit and implicit layers of culture, actively stimulating a shared identity, building and maintaining trust, ensuring open and transparent communication, and promoting a flexible, learning-oriented mindset are all non-negotiable. Failure to thoughtfully address these cultural elements could lead to significant employee resistance, operational disruptions, and ultimately negative progress on the change acceptance (Asaoka, 2019; Haque, 2021; Okafor, 2019; Smeulders et al., 2023).



Figure 7: Impact categories on change implementations.



Figure 8: Impact categories on change implementations through informal lens.

3.3. Bootlegging and Informal Innovation

Bootlegging, in an organisational context, refers to 'the process by which individuals take the initiative to work on ideas that have no formal organisational support and are often hidden from the sight of senior management, but are undertaken with the aim of producing innovations that will benefit the company' (Globocnik et al., 2020). This means employees start projects or develop solutions on their own, often using their own time or resources without official permission. For example, an employee might secretly work on a side project as they truly believe it could bring value to the company, even if it falls outside their official job requirements. These efforts are typically driven by an employee's personal passion, curiosity (or insecurity), or a strong belief in their idea's potential, even when it is not a top-down priority. Mainemelis (2010) refers to this as 'creative deviance in the evolution of new ideas', highlighting how individuals are fuelled to pursue innovations outside the usual company channels.

3.3.1. How bootlegging stimulates innovation

Even though bootlegging projects are 'unauthorised', they can be a significant source of innovation and improvement for organisations. They allow for experimentation and creativity that might be too risky or too unconventional according to the formal (approval) processes. Employees that engage in bootlegging practices can explore new concepts that leadership might not have considered or approved formally, potentially leading to unexpected breakthroughs (Mainemelis, 2010). This kind of activity is more likely to thrive in environments where employees feel a certain level of autonomy and where the company culture subtly permits such independent initiatives. Bootlegging activities show a proactive attitude among employees who search for a contribution beyond their immediate job requests, tasks, and targets. In this sense, bootlegging can be seen as an informal addition to formal innovation strategies, extending the organisation's formal routines to explore new ideas without requiring immediate managerial support.

3.3.2. Why bootlegging matters for organisational change

Within the broader context of organisational change, bootlegging could act as a stimulator for new ideas that might challenge existing norms or even provide the way for future changes. The solutions developed through bootlegging could, for example, uncover more efficient processes or new product possibilities which in turn could inform a larger change initiative. It proves that employees are thinking creatively about how to improve their position and the organisation, even if their methods are unconventional.

For change initiators, understanding bootlegging means recognising that valuable innovation and change implementation or resistance could emerge from unexpected places. This highlights the importance of stimulating an environment where curiosity and initiative are encouraged, even if sometimes informal. At the same time, it raises critical questions about visibility and alignment, as bootlegging remains hidden, organisations may benefit from the outcomes but lack insight into the conditions that made them possible. Identifying and 'accepting' promising bootlegging projects could be a powerful way to discover organic solutions and drive future change(s) from within (Zhao et al., 2025).

3.3.3. Different types of bootlegging

In existing literature, bootlegging is usually described as employees informally working on ideas that are not officially approved, but which they believe will provide the organisation with benefits in the long run (Criscuolo et al., 2013; Globocnik et al., 2022). Some authors describe more innovation-driven bootlegging, where employees develop new products, services or processes next to their regular formal work, while others, recognise smaller, exploratory forms of bootlegging that are mainly about trying new knowledge or solutions on a limited scale (Criscuolo et al., 2013; Globocnik et al., 2022). From a deviance perspective, a distinction is also made between constructive bootlegging that supports organisational goals, and less constructive forms that could create risks or disturb the organisational process, when remained hidden (Mainemelis, 2010; Zheng et al., 2024). Finally, bootlegging is often linked, as mentioned before, to the broader idea of creative deviance, in which employees purposely continue to work on ideas that have not been formally approved, as they feel that stopping would go against what is needed for good work for future developments (Criscuolo et al., 2013; Mainemelis, 2010). This makes that bootlegging behaviour could play an important role during post-merger integration as informal employee initiatives may help organisations adapt to change and address integration challenges that are not fully captured by formal processes (Criscuolo et al., 2013).

3.4. Conceptual Link between Bootlegging and Post-Merger Integration

Having explored the importance and aspects of change management, the focus of this paper will shift to its application within the specific and complex context of mergers and acquisitions (M&A). M&As are perhaps one of the most significant and challenging forms of organisational change that a company could experience. M&As are not simply about combining financial assets and product lines, they involve bringing together different ways of working, distinct organisational structures and cultures, and most important, different groups of people (Asaoka, 2019; Haque, 2021).

The relevance of effective change management within the M&A context cannot be highlighted enough. Even with a well-planned and executed approach, these enormous changes during M&A, is constantly being challenged by (un)expected obstacles. These obstacles could include employee resistance to new procedures, clashes between organisational cultures, a lack of employee engagement and productivity in times of uncertainty, and many more (Smeulders et al., 2023; Weber & Tarba, 2012). Therefore, understanding the M&A context and navigating these challenges through the lens of change management is crucial for the success of M&A change implementations.

To fully understand the dynamics of change management, including the phenomenon of bootlegging, within this research, it is an important start to create a deeper understanding of M&As themselves. This section will delve deeper into what M&A are about, explore its typologies, and examine the typical phases involved. By gasping these M&A elements, it is aimed to understand the specific context in which the researched change management principles are applied and where unique challenges and opportunities might arise.

3.4.1. Interest in context

In today's global economy, Mergers and Acquisitions (M&A) have become much more than just occasional business deals. They are currently considered to be a standard and dominant part of business. M&A transactions are seen as essential tools for companies that desire to restructure, survive, or grow (Asaoka, 2019). The size of M&A activities is enormous. In 2018, the total value of M&A deals around the world hit a record of \$3.35 trillion. Experts suggest that this trend is not expected to decline (Bansal, 2019; Okafor, 2019).

The main reason companies are eager to set these deals is the promise and expectation of synergy. The principle of synergy is the 'holy grail' of M&A, often described with the simple math of '1+1=3'. The idea is simple: if two companies combine, their total value and performance is expected to be greater than the sum of their individual parts (Bansal, 2019). Companies chose this path to grow quickly, enter new markets, or offer new products. For many executives, when resources are available, buying an existing company is much faster and easier than trying to build a new business from scratch. It is a way to buy certainty in an uncertain market.

3.4.2. The paradox of risk

However, there is to be a major problem when it comes to M&A. While companies are enthusiastic about making deals, the reality is often less positive. M&A deals are extremely risky with research consistently showing a very high failure rate. Estimates frequently suggest that 70% to 90% of these transactions fail to achieve the goals they set out to reach (Koi-Akrofi et al., 2016).

When a deal fails, it often leads to impairment loss. In simple terms, this means the buying company paid too much for the target company and lost money (Asaoka, 2019). While business leaders often blame the market or the economy for these failures, the real root cause is to be the 'human factor'.

Decisions about M&A are often made under high pressure, with strict deadlines and incomplete information. In this environment, managers are prone to overconfidence bias. They trust their gut feelings and believe they are the ones to manage the complex merger better than the statistics suggest (Asaoka, 2019). Furthermore, before the deal is signed, everyone focuses mainly on the financial numbers, being assets, profits, and costs. This focus on numbers leads for them to often ignore the 'soft' factors, such as company culture and employee emotions towards the upcoming changes. However, these soft factors are often the real reason a merger falls apart (Weber & Tarba, 2012).

3.4.3. M&A typologies

To understand the topic of M&A, it is important to look at the different ways these deals are structured. The term 'M&A' is used as a summarising term, but it describes two different things.

3.4.3.1. The acquisition

Also known as 'the takeover' is the most common type. It happens when one company takes control of another. Usually a larger company (the acquirer) buys a smaller one (the target). Most of what we call M&A is actually acquisitions (Bansal, 2019).

3.4.3.2. The merger

Also known as 'the union' or 'a true merger', is when two companies of roughly the same size join forces to create a single new organisation. These are often called a 'merger of equals' to make it look fair. However, in reality, one side usually ends up with more power than the other (Koi-Akrofi et al., 2016).

3.4.3.3. The relationship of the M&A

Besides being recognised as a merger or acquisition, organisations are also categorised by the relationship between the two companies (Cintron, 2020; Okafor, 2019).

- **Horizontal M&A:** combining two competitors from the same industry. The goal is to gain a bigger piece of the market and reduce competition.
- **Vertical M&A:** combining companies that are in the same supply chain. For example, a car manufacturer buying a tire company. The goal is to gain control over the supply chain and save money.
- **Conglomerate M&A:** combining companies from completely different industries. This is used to spread out risk. If only one industry performs less, the other might perform better.

3.4.4. The critical part of M&A

The entire M&A process is not a single event but a lifecycle divided into several distinct stages. According to the 'M&A process' defined by Okafor (2019) (Figure 9), these stages typically move from identifying a target and making the initial decision, through to the negotiation and formal completion of the deal.

Once it is clear the deal is final, the post-merger integration (PMI) will set in. PMI has been widely recognised as a critical phase in determining the success of M&As, as organisational, cultural, and structural differences must be aligned to realise expected synergies, resulting in the most complex, chaotic, and failure-prone stage of the entire M&A lifecycle (Smeulders et al., 2023; Koi-Akrofi et al., 2016). It has shown to be easier to sign a deal than to make two distinct entities function as one. PMI is the phase where histories, cultures, and workforces are expected to be combined and where the fate of the new organisation is decided. As the success of the entire transaction relies on the PMI, this phase will be presented as the context for this research.

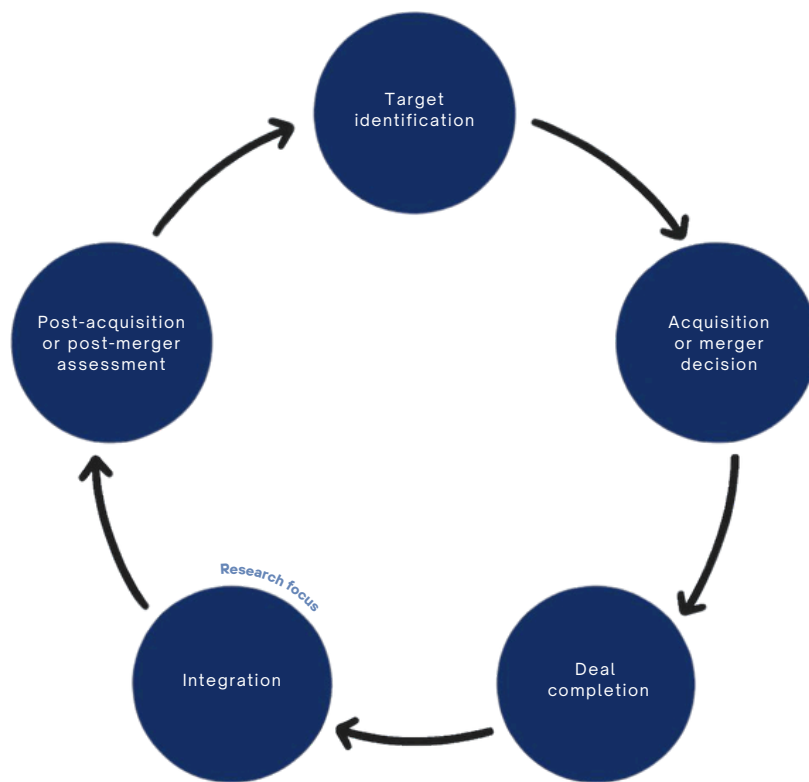


Figure 9: M&A circular process (Okafor, 2019).

3.4.4.1. Cultural clash

One of the biggest obstacles during integration is organisational culture. Culture is the shared values, beliefs, and the ‘way of working’ in a company (Schein, 2010). Since culture is often rooted within the people and social groups presenting the company and as it is often unconscious, it is very hard to change.

When two firms merge, they go through a process called acculturation, where two cultures meet and try to ‘live’ together (Nahavandi & Malekzadeh, 1988). If the buying company ignores the unique culture of the company or companies it bought, it likely to lead to a ‘culture clash’. Differences in how people communicate or make decisions can create friction, which could negatively influence the value of the deal.

3.4.4.2. Us vs. them

The local perceived stress of a merger can be explained through the ‘Social Identity Theory’. People often define who they are through a lot of different elements such as: where they work (Ashforth & Mael, 1989). When a M&A takes place, that identity is threatened.

Employees face ‘self-uncertainty’, meaning during an M&A it is likely people worry about their job, their role, and their future. To feel safe, they identify more strongly with their old group. This creates a split between ‘us’ (the old group) and ‘them’ (the new group). Research shows that if this uncertainty is not managed, it builds psychological walls, silos, between the two groups, influencing the overall organisation performance (Hogg et al., 2023).

This drawback into safe groups creates a ‘silo mentality’. Silos are not just physical walls, they are behavioural barriers, often resulting in subgroups refusing to share information or work with other parts of the company (Jeske & Olsen, 2024).

In a M&A, silos are often defence mechanisms. Employees are trying to protect themselves and the people or elements they care for. However, silos are a threat to the business. If the new combined organisation is not to share information freely, it will struggle with the integration, innovation and synergy it may be hoping for (Bento et al., 2020; De Waal et al., 2019).

3.4.5. Change management as key to M&A success

As the challenge of managing people, culture, and silos are so high, a well thought through change management strategy is essential. M&A causes a massive shift that affects every single employee (Khaw et al., 2022). Therefore, using, and most importantly flexibility regarding these created change management strategies during the integration phase is often the difference between success and failure.

3.4.5.1. Organisational fairness

A huge part of change management is 'organisational justice'. Bansal (2019) argues that employees will only accept the changes if they feel the process is fair. There are three types of fairness:

- **Distributive justice:** is the outcome fair? (e.g. did the right people get promotions?)
- **Procedural justice:** was the process used to make the decision fair?
- **Interactional justice:** were employees treated with respect and honesty?

Research suggests that during a merger, how people are treated (procedural and interactional justice) is often more important than the actual result. Even if the news is 'bad', like an unexpected or undesired role change, employees are less likely to resist if the process was transparent and they were treated with dignity (Bansal, 2019). If management is secretive or not communication truthful information, trust disappears.

3.4.5.2. Handling resistance

Resistance to change is normal. However, managers should not see resistance always as 'negative behaviour'. Instead, it should be seen as an interest, a mix of complex emotions like fear and anxiety (Ford et al., 2008; Piderit, 2000). Employees are not fighting the organisation, they are often fighting to keep their sense of security. If managers 'punish' this attitude, it likely creates more conflict. Effective change management addresses these emotions through for example creating psychological safety (Edmondson, 1999; Newman et al., 2017).

3.4.5.3. A new identity

Finally, success depends on 'transformational leadership'. Meaning that leaders should do more than just manage tasks, they should inspire people (Khaw et al., 2022). In a large change as an M&A, it is about managing the new identity of the organisation. If a leader tries to force a new identity too fast, it often backfires. Instead, leaders should promote an intergroup relational identity (Hogg et al., 2023). This means the group and leadership team acknowledges the history and strengths of the old organisations, while also promoting a new, shared future. By respecting the past, while building the future, leaders can break down silos and help the M&As desired goals come to light.

4. Theoretical Framework

This chapter presents the theoretical framework that was developed to create the base for analysing the importance of the key dimensions that concern the change implementation success within the context of M&A.

The theoretical framework is constructed through a synthesis of existing academic literature. The framework identifies and structures critical impact dimensions into four primary categories: organisational, social, human, cultural. These categories serve as the foundational lens for understanding the complex dynamics of integration and change implementation during M&A practices, especially during the PMI phase.

It is important to note that while this framework relies on the different insights from the theoretical background chapter, the perspective of 'bootlegging' is not explicitly detailed as dimension within the framework. Instead, the concept of bootlegging is introduced during the data collection phase. As it has been incorporated into the interview questions to test the validity of this theoretical framework, which is based on current literature knowledge, and to explore how informal innovation and practices may interact with the established, 'known' formal dimensions, influencing the integration and change implementation.

4.1. Framework Development

To understand the collective connection and be able to analyse the factors influencing the success of change implementation within M&A, a theoretical framework (see Table 1) was developed based on all insights retrieved and clustered (see Appendix 3) from the currently known literature. This framework serves as the lens through which the complexities and choices regarding change implementations are to be argued and analysed.

The development process of this conceptual framework followed four phases (Figure 10).

1. **Researching impact factors:** an extensive literature review was conducted to identify the important factors of change success. This involved understanding and highlighting the specific variables that lead either to the failure or successful adoption of new changes.
2. **Identifying categories:** based on the collection of these factors, four overarching categories were created to organise the data: organisational, social, human, and cultural. These categories were selected to ensure a holistic view, covering both the structural (tangible) elements of change, as well as the psychological (intangible) dynamics.
3. **Clustering factors:** the specific factors identified in the research phase were clustered into their core areas of topic or impact. A necessary disclaimer for this framework is that many of these factors are intertwined. However, for academic clarity, they have been grouped based on their primary domain of influence.
4. **Creation of conceptual framework:** these clusters were synthesised to create the final conceptual framework. This framework aims to explain how these distinct but related factors collectively influence the progress and outcome of the change process.

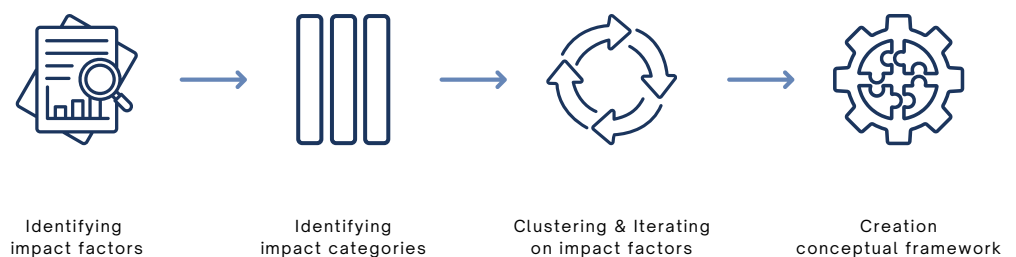


Figure 10: Simplified development process of conceptual framework.
 Note: the 'linear' process was in fact an iterative process within and between the different steps.

4.2. Conceptual Framework

Table 1: Conceptual framework.

Category	Dimension	Managerial Aim	Description
1.Organisational	1.1. Leadership and vision	To ensure top management creates a unified direction and provides the essential resources to drive the change implementation forward.	Focuses on the fundamental top-down factors: the clarity of the vision, the authority of the decision-makers, and the provision of necessary resources and training that is provided during integration and implementation. (Bansal, 2019; Cintron, 2020; De Waal et al., 2019; Smeulders et al., 2023).
	1.2. Structure and operational frameworks	To set up the formal organisational structures and processes that define the operational environment and manage the change implementation complexity.	This is about the set, formal elements of the organisational structure and strategy, which realise the day-to-day work environment and overall complexity. (Bansal, 2019; Cintron, 2020; Smeulders et al. 2023).
	1.3. Organisational interaction and communication	To manage all forms of interaction and information flow, to limit internal resistance, and stimulate a shared, cooperative work environment.	Focuses on the human (top-down) interactive dynamics, which include effective (truthful and transparent) communication (Bansal, 2019; Haque, 2019) to maximise employee involvement (Cintron, 2020), limit silo mentality (Bento et al., 2020), and positively impact attitudes and trust in management (Bansal, 2019).
2.Social	2.1. Group identity and cohesion	To overcome the us vs. them mindset by actively forming a new, shared collective identity that promotes cooperation.	Focuses on the psychological state and emotional connections (affective bonds) that either cause internal fragmentation (ingroup vs. outgroup) or form the basis for a shared group identity, stimulating successful collaboration and integration. (Cintron, 2020; Hogg et al., 2023; Khaw et al., 2022; Smeulders et al., 2023).
	2.2. Interpersonal relationships and influence	To understand how personal relationships, social influences, and informal networks shape group and individual behaviour during the integration.	Concerns aspects like trust, informal relationships (boundary spanning), peer pressure (Bento et al., 2020), and influential (prototypical) colleagues (Hogg et al., 2023) and how they determine and guide interactions and behavioural patterns between individuals and departments/teams within the integration context.
	2.3. Knowledge transfer barriers	To limit, if not resolve the functional and structural barriers that prevent the effective daily sharing and long-term sharing of (critical) knowledge and skills.	Focuses on addressing the challenges within daily operations, such as silo mentality (De Waal et al., 2019; Jeske & Olsen, 2024), and communication style, that hinder the necessary flow of knowledge and successful collective learning (Bento et al., 2020; De Waal et al., 2019).
3.Human	3.1. Individual psychological state and security	To manage the cognitive and emotional impact of the change, specifically addressing the individual's fundamental need for security and certainty.	Focuses on the cognitive and emotional drivers that determine how an individual copes with their emotions that are caused by organisational changes and are derived from the intrinsic human motivation to reduce self-uncertainty, and achieve adaptive functioning (Hogg et al., 2023).
	3.2. Motivation and behavioural choice	To influence motivation (intrinsic and extrinsic) and ensure psychological safety for them to engage and express themselves (voice).	Explores the internal (intrinsic) and external (extrinsic) drivers that influence individual behavioural choices, including the choice of potential positive commitment, loyalty, empowerment or withdrawal (Bento et al., 2020; Yeboah, 2023), often based on their perceived psychological safety (Khaw et al., 2022; Newman et al., 2017).
	3.3. Skills, training and confidence	To assess and develop the individual's current skills and self-confidence which is key to seeing the change as an opportunity.	Deals with the individual's actual (factual) and perceived capabilities (competences and skills) and how their level of confidence dictates their perspective on the integration, as either a threat or a positive challenge (Hogg et al., 2023).
4.Culture	4.1. Formal cultural alignment	To ensure the formal, visible elements of the two cultures (practices, systems, and symbols) are structurally and operationally compatible.	This concerns the formal and structural compatibility between the organisations, including the alignment of daily practices, core values, and the integration of operational processes and systems (Cintron, 2020; Koi-Akrofi et al., 2016; Smeulders et al., 2023; Weber & Tarba, 2012).
	4.2. Collective identity and group relations	To determine the informal dynamics and intergroup relationships that create / construct the new collective identity and enable sociocultural integration.	This is about the social cohesion, shared values, and trust that form the 'relational core' of the merged entity (Helmy et al., 2023), which is essential for a shared collective identity (Bansal, 2019; Cintron, 2020) and group relations (Hogg et al., 2023).
	4.3. Flexibility, learning and mindset	To influence the dynamic processes, communication styles, and cultural attitude that promote adaptability and learning throughout the integration.	Focuses on the cultural capability for mutual learning, flexibility, and adaptation (Cintron, 2020; Hofstede, 2011), which are critical cultural dimensions that facilitate the human response and organisational sustainability (De Waal et al., 2019; Yeboah, 2023).

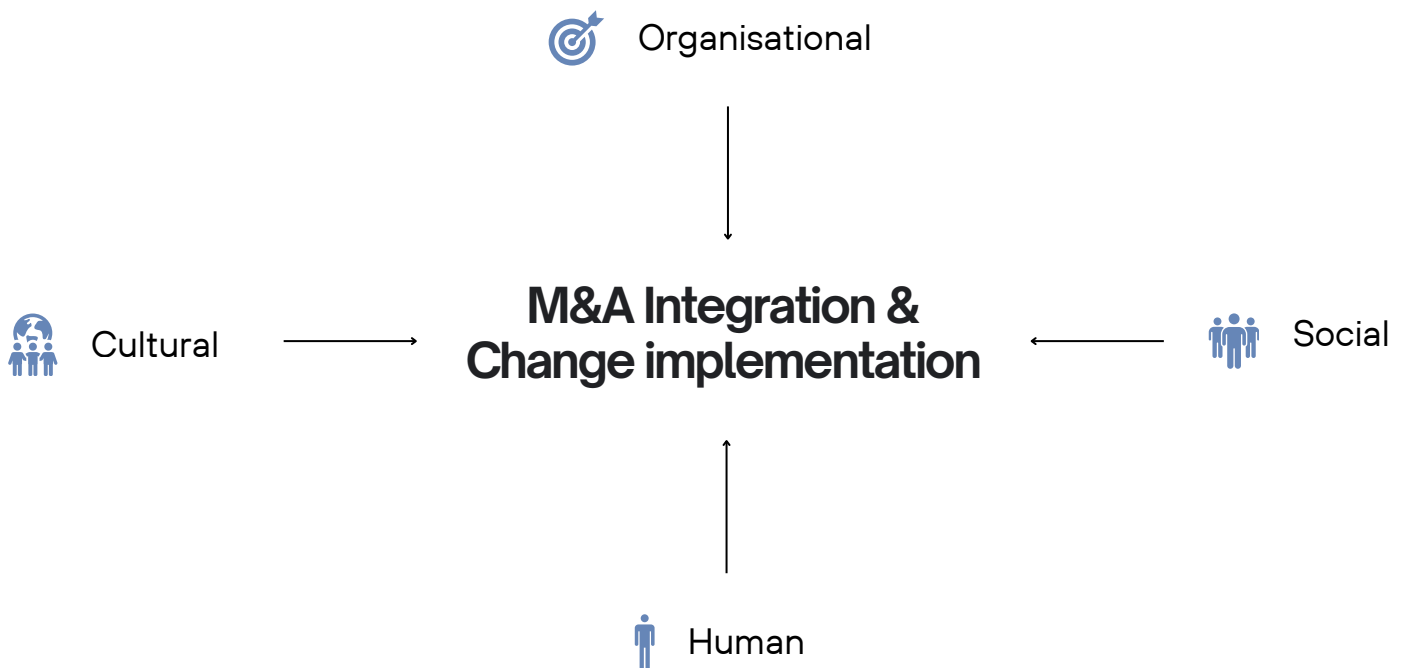
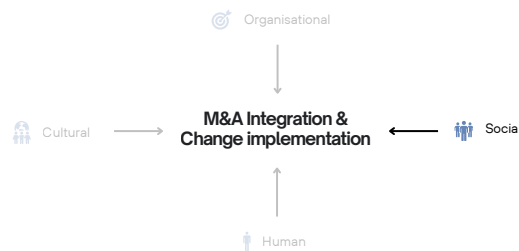
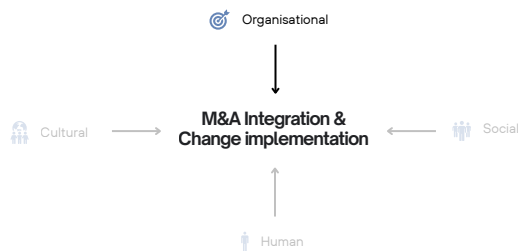


Figure 11: Conceptual framework categories.



4.2.1. Category 1: Organisation

In the context of change management, the organisational category represents the top-down strategic mechanisms required to guide the organisation towards the desired new situation, the after-change scenario. Without these structural organisational dimensions, change initiatives would lack or underestimate the necessary direction and resources in order to succeed.

4.2.1.1. Leadership and vision

Change management literature emphasises that successful transformation starts with a clear direction. This dimension focuses on the determined vision, authority, and resources provided by top management. Top-level decisions are strategic and critical for implementation success (Bansal, 2019; Cintron, 2020). Top-down commitment moves beyond verbal support, it also requires the allocation of resources and training (Smeulders et al., 2023). A lack of authority or an incorrect strategy contributes to integration failure. Leaders must remain connected to common goals to manage effectively and act flexibly as the implementation plans evolve (De Waal et al., 2019).

4.2.1.2. Structure and operational frameworks

While leadership and vision provide the 'why', this dimension addresses the 'how', considering the formal frameworks that shape the operational environment. Structural preconditions determine the complexity of system integration. Research indicates that organisations with similar pre-existing structures tend to have higher success rates (Jeske & Olsen, 2024). Furthermore, national culture could be considered as external factor influencing the fit between organisation's structure and its strategy, but due to its external influence will be neglected in this research (Hofstede, 2011; Weber & Tarba, 2012).

4.2.1.3. Organisational interaction and communication

Effective change management relies on minimising resistance. This dimension therefore focuses on limiting silo mentality and fostering interaction. Silos create structural barriers that prevent the collaboration necessary for a unified entity (Bento et al., 2020). To mitigate this, maximising employee participation is cited by Cintron (2020) as a 'best practice' for managers. When it comes to communication, truthful and transparent communication lines is recognised as a critical success factor (CSF) (Haque, 2021). Managing the flow of information is essential to reduce uncertainty and stimulate a shared, cooperative work environment (Bansal, 2019).

4.2.2. Category 2: Social

Change is rarely an isolated individual experience, it occurs within groups. The social category builds upon the Social Identity Theory (SIT) to explain how intergroup dynamics can either facilitate or hinder M&A integration and change implementation.

4.2.2.1. Group identity and cohesion

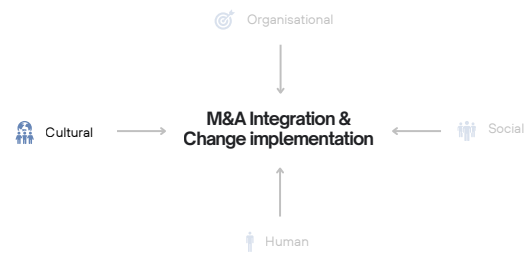
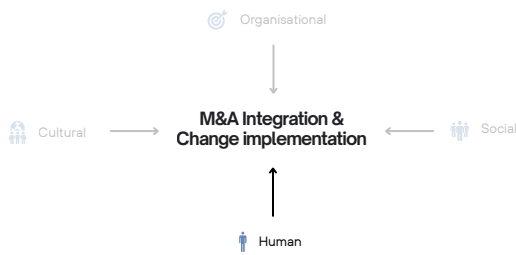
A major challenge in M&A, as was mentioned in Chapter 3.4, is the 'us vs. Them' mindset. According to the Social Identity Theory, employees retrieve part of their self-concept from the group that they are part of (Ashforth & Mael, 1989). When facing change, individuals may respond by identifying strongly with their pre-merger group ('ingroup') and viewing the merging partners ('outgroup') as negative (Hogg et al., 2023; Smeulders et al., 2023). Therefore, successful implementation requires sociocultural integration that focuses on creating a new, unified group identity in order to reduce this fragmentation (Cintron, 2020).

4.2.2.2. Interpersonal relationships and their influences

Trust could be called 'the currency of social exchange' during change. This dimension focuses on how interpersonal relationships shape behaviour. Trust is essential in requiring these successful relationships and integration (Hogg et al., 2023). Furthermore, change adoption is often socially reinforced. Individuals consider their colleagues and 'prototypical leaders' (those best representing the group) for cues on how to behave (Bento et al., 2020). This highlights that change implementations are a horizontal process influenced by peer networks as much as it is a vertical one managed by top-down strategies.

4.2.2.3. Knowledge transfer barriers

The realisation of synergies, often being the primary goal of M&As, depends on the transfer of knowledge. Social structures like silos could block this information flow (Aichouche et al., 2022). Acknowledging these barriers is therefore key for stimulating and achieving collective learning (Bento et al., 2020). The conceptual framework suggests that transparent internal communication and addressing the motivation for knowledge sharing are critical to overcome these functional barriers (Khaw et al., 2022; De Waal et al., 2019).



4.2.3. Category 3: Human

Ultimately, organisations change only when the individuals representing them change. The human category addresses the cognitive and emotional drivers that determine individual readiness for change (Amernakis & Harris, 1993).

4.2.3.1. Individual psychological state and security

The primary psychological driver in this dimension is the human need for certainty. Organisational change is often perceived as a threat, generating stress and anxiety (Khaw et al., 2022). Since humans are intrinsically motivated to reduce uncertainty to plan their behaviour (Hogg et al., 2023), maintaining a sense of self-certainty is necessary for adaptive functioning. The desire for predictability is closely linked to managing initial responses and emotions during change (Hofstede, 2011).

4.2.3.2. Motivation and behavioural choice

This dimension explores why employees choose to engage with or withdraw from the integration and change implementation process. These behavioural choices are heavily dependent on psychological safety (Newman et al., 2017). When employees feel safe, their intent to share knowledge and help others (including the organisation) increases. Conversely, extrinsic rewards could negatively impact attitudes if not aligned with intrinsic motivations (Yeboah, 2023). Individual empowerment is therefore essential for maintaining performance during change implementation (Bento et al., 2023).

4.2.3.3. Skills, training, and confidence

For change to be implemented successfully, employees must feel capable of operating within the new 'environment'. This dimension therefore addresses self-efficacy; the individual's confidence in their ability to manage the new situation (Yeboah, 2023). Change implementation requires for employees that are not only willing but also trained and developed to meet new challenges (Khaw et al., 2022). However, there should be an acknowledgement that overconfidence could act as a risk, potentially leading to errors in decision-making (Asaoka, 2019).

4.2.4. Category 4: Culture

Culture is often described as one of the 'soft' factor that causes the 'hard' failures of M&A. This category focuses on the cultural compatibility of the merging entities and the mindset that is required for a successful integration and change implementation.

4.2.4.1. Formal cultural alignment

This dimension refers to the structural compatibility of the organisations. Organisational culture is identified as an essential component in change processes (Weber & Tarba, 2012). Differences in practices, systems, and symbols can negatively impact performance and are a frequent cause of M&A failure (Koi-Akrofi et al., 2016). Effective cultural integration requires an alignment of these formal elements to create a unified structure that is ready for (new) change implementations.

4.2.4.2. Collective cultural identity and social dynamics

Beyond the formal alignment, this dimension addresses the 'relational core' of the organisation. Removing conflicting mindsets is crucial to avoid conflict (Hogg et al., 2023). Trust and psychological safety are linked to the creation of organisational cohesion (Newman et al., 2017). Furthermore, communicating the organisation's heritage and values help the creation of a shared, positive environment (Bansal, 2019), which is essential for the social acceptance of change and the new scenario.

4.2.4.3. Cultural flexibility, learning, and mindset

Finally, change implementation as mentioned before, is considered to be a dynamic process. This dimension highlights the need for an organisation's cultural capability to be adaptive to change (Hofstede, 2011). A culture that promotes and includes adaptive learning and flexibility facilitates more positive and open responses to change implementations (Cintron, 2020). Promoting knowledge sharing and continuous training are crucial for stimulating this cultural learning (De Waal et al., 2019; Yeboah, 2023), ensuring the change is also sustainable in the long run.

5. Research Methodology

This research adopts a qualitative single-case study design to explore how bootlegging behaviour may influence post-merger integration within an organisational context (Yin, 2018). The research protocol, data collection and analysis as well as its viability and reliability are discussed.

The interview data were analysed using thematic analysis, allowing recurring patterns and themes related to bootlegging and post-merger integration to be identified (Braun & Clarke, 2006).

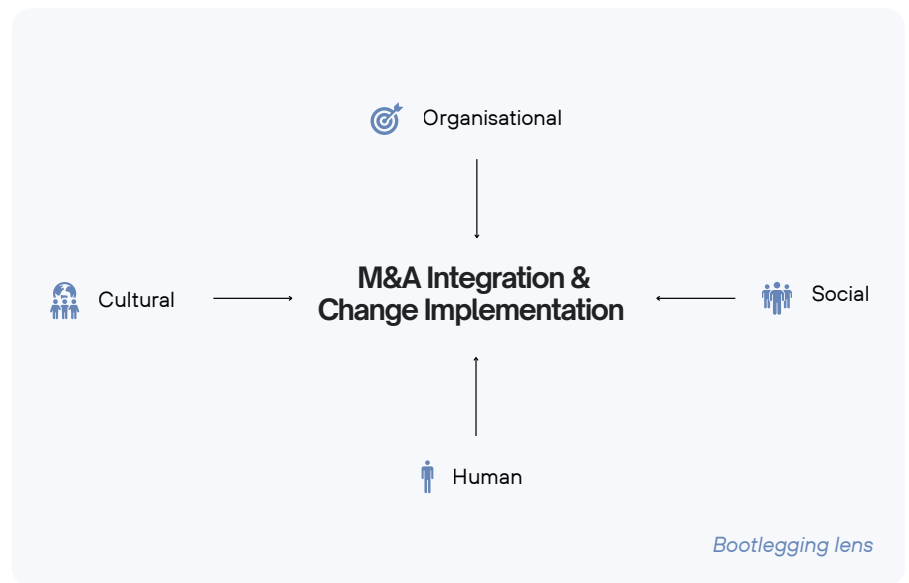


Figure 12: Conceptual framework with bootlegging lens as research approach.

5.1. Philosophy and Approach

To truly understand how changes happen in a company and how people create their informal solutions, we need to consider elements from people's personal viewpoints. This study is therefore based on the interpretivist philosophy. This perspective suggests that what is considered 'reality' in a social setting is not a single, fixed truth. Instead, it is made up of many different meanings and understandings that people create through their interactions and experiences (Van der Walt, 2020). Therefore, understanding the detailed perspectives of individuals within their specific setting is key to uncovering the human side of the M&A and its corresponding changes.

Following this interpretivist philosophy, a qualitative research approach was chosen for the research study. This method is excellent for deep exploration, allowing to collect rich, descriptive data that reveals deeper layers, such as the 'why' and 'how' things happen (Nguyen, 2015). This qualitative approach provides a strong base to uncover complex social processes, motivations, and personal experiences regarding the change and connected context. These elements are essential for understanding the influential (in)formal dimensions during change implementation. This in-depth knowledge is an important base for providing strategic advice that is grounded in the actual reality of the employees rather than theoretical assumptions.

5.2. Research Design

This research uses an exploratory single-case study design, focusing on one specific company undergoing M&A related changes. This design is effective for studying challenges in their real-world setting, especially when a topic, such as bootlegging in a post-merger environment, is not yet to be fully explored. The 'exploratory' nature means that research is done aiming to discover new insights and develop ideas rather than simply testing existing theories.

Focusing on a case study allows this research to collect detailed information and in-depth analysis. This helps to understand the case company's unique experiences. This more in-depth data provides a valuable base for showing how complex change implementation can be and for describing the specific role of bootlegging practices within such an organisation. While the findings may not be directly applicable for every other company, this case study helps to build and refine current change management perspectives by providing a detailed picture of a specific merger context.

5.3. Data Collection

The method of 'semi-structured interviews' was used to collect data. This method offers a balance between asking specific questions about the research areas and allowing flexibility to explore new ideas or unexpected insights that might come to light within the interview.

5.3.1. Participants

To gather a representative and balanced set of perspectives, the participants that were selected for this study, have all been employed at the case company in times of before and during the M&A integration. Therefore, all participants have experienced change implementations. In total, 15 interviews were conducted to reach a point of data saturation, where new interviews no longer provided significantly new information.

Participants from different operational levels and departments were chosen to ensure a broad understanding of how the change might have impacted the organisation. This included employees of the leadership team (LT), the management team (MT), and operational staff. To capture different organisational backgrounds, it was aimed to recruit individuals from both original companies involved in the merger. Furthermore, a balanced number of genders was desired to ensure in order for the findings to reflect a diverse range of experiences rather than a one-sided view.

5.3.2. Sampling strategy

A purposive sampling strategy was used to carefully select participants who could provide rich and relevant information. The sampling plan was designed to ensure good representation across several key areas within the company. Specifically, the study includes individuals from departments that were significantly influenced by the M&A. While senior leaders were included, there was a special focus on a higher number of operational staff, as employees at these levels often lead informal bootlegging practices.

To understand insights from both sides of the merger, an approximately equal number of participants from each of the two original companies was included. By selecting participants across these different groups, the study aims to collect data that reflects the 'average experience' within the organisation, making the final insights more representative and generalisable.

5.3.3. Interview protocol

An interview protocol was created to navigate the semi-structured interviews and manage participant expectations (see Appendix 5). The interview protocol provides a practical guide to ensure the consistent coverage of the main impact areas as were concluded within the proposed conceptual framework (see Table 1). The interview questions were designed accordingly, to ensure a direct link with the four impact dimensions (organisation, social, human, culture) of the proposed framework. In this way, a structured way was created to explore the different effects of change.

Additionally, all questions were designed from a bootlegging perspective. This 'bootlegging perspective' encourages participants to discuss their (in)formal actions, workarounds, or informal initiatives related to the integration process and change implementations. This approach aims to uncover how informal contributions or ways of handling with change showed up, and how these informal actions relate to the specific impact categories within the framework. The protocol includes opening and closing remarks, clearly explaining ethical considerations like informed consent and confidentiality.

5.4.4. Interview procedure

Interviews were conducted in person. This provided the opportunity to observe non-verbal cues and create a more personal interaction, which helped in collecting rich data. Each interview was transcribed by using Microsoft Teams, after which they were manually checked for accuracy.

Each interview started with an explanation of expectations, confirmation that participation was voluntary, and clear promises of confidentiality and anonymity. Written informed consent was obtained from all participants. While all interviews were intended to be audio-recorded, recordings were not done for all participants due to specific requests for privacy regarding the sensitive nature of the topic. In these cases, only written transcriptions as well as notes were taken during the interview to capture context, first impressions, and non-verbal information to add depth to the transcribed data.

5.4. Data Analysis

The collected qualitative data will be analysed through a thematic analysis. This known and flexible method is used to systematically identify, analyse, and report recurring patterns or 'themes' within qualitative data (Braun & Clarke, 2013). It allows both inductive (themes discovered directly from the data) and deductive (themes guided by the conceptual framework) approaches. In this way, the thematic analysis provides a suitable connection to find both new insights and connect them to established theories.

Throughout the data analysis process, special attention was given to finding new themes related to bootlegging; exploring its different forms, the motivations for people do it, and how it influences the progress and outcomes of change implementations. For the qualitative data analysis, the data was manually analysed to ensure close connection to the participants' stories.

The data analysis followed six main steps, which are also shown in Figure 13:

1. **Familiarisation:** repeatedly reading the transcripts to a deep sense of the data.
2. **Generating codes:** systematically labelling interesting parts of the text (e.g. specific bootlegging activities or feelings).
3. **Searching for themes:** grouping codes into broader patterns.
4. **Reviewing themes:** checking the themes against the original data to ensure they are accurate and distinct.
5. **Defining themes:** clearly naming each theme and explaining what it tells us about the merger.
6. **Reporting:** documenting the results using the different insights and where possible quotes of the 15 participants to support the conclusions.

For more in-depth insights and structure of the thematic analysis, please see Appendix 6.

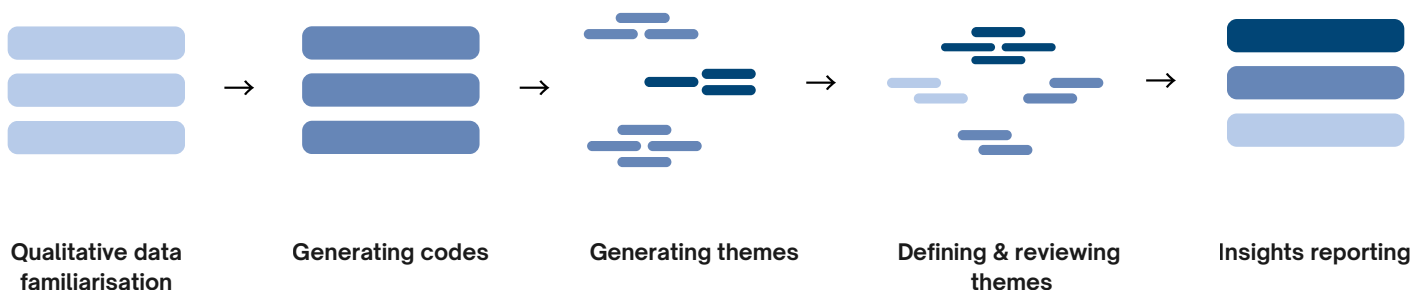


Figure 13: Simplified thematic analysis steps.

5.5. Reliability and Validity

To ensure the findings of this research are reliable, useful and academically valid, the criteria for qualitative trustworthiness were applied, see Table 2 (Nowell et al., 2017).

Table 2: Criteria for qualitative trustworthiness.

<p>Credibility</p>	<p>Believability was achieved by using quotes from the anonymised participants where possible to support findings. However, since not all participants agreed on the use of quotations, credibility was also strengthened by using thematic insights. These represent clear, recurring patterns found across multiple interviews. By combining specific quotes with these broader insights, a more accurate and representative picture of the employees' reality was created.</p>
<p>Dependability</p>	<p>Dependability refers to the stability and consistency of the research findings over time. This was ensured by creating a clear protocol and documentation strategy that tracks every step of the study. This involved keeping records of how participants were selected, how the data was stored, and how the coding was performed. By creating a descriptive explanation on the research steps, from the initial interview notes to the final themes, it is ensured that the logic used to reach conclusions is transparent. This transparency allows the research to be viewed as logical and repeatable rather than a series of random conversations and observations.</p>
<p>Confirmability</p>	<p>To ensure the findings were based on real-world data insights rather than personal bias, an iterative refinement was done. Initially, a conceptual framework (Table 1) was proposed which has been based on existing literature. The interview questions were built directly from this framework to test its relevance. As insights were gained from the 15 interviews (the practical perspective), this new information was used to update and iterate on the originally proposed framework. This turned the initial theory into a more realistic model of what has actually happened in the case company, and therefore what should be considered when implementing change within a company. This final, revised framework serves as novel base for further strategic steps within M&A and CM.</p>
<p>Transferability</p>	<p>While this study focuses on one company, a clear description of the M&A context, as well as the operational layers has been provided. This will allow other researchers to determine whether these findings could be useful or a source of inspiration for other organisations facing similar situations.</p>

Supporting the research trustworthiness, different ethical guidelines were followed throughout all parts of the study. All participants were requested to provide their informed consent, understanding the research purpose, procedures, and their right to withdraw at any given time without any consequences. Due to privacy and the sensitive nature of discussing experiences and informal factors, raw data and transcripts are not presented within the report. Instead, only the research insights, clusters, themes, some anonymised quotes, and final conclusions are mentioned within the text or appendices.

Confidentiality and anonymity were maintained for all data and participants using pseudonyms and secure data storage. Participation was entirely voluntary. Furthermore, reflexivity was practiced throughout the research, meaning that constant reflection on the background and potential biases was maintained, to ensure they did not unfairly influence the data interpretation.

6. Research Results

This chapter presents the findings of the study and addresses the research question by analysing how bootlegging behaviour emerged during the post-merger integration process. While the initial research design was guided by a theoretical framework, the findings will be presented using a descriptive practical perspective to capture the lived reality of the employees. The purpose of this chapter is to present the outcomes of the interviews, categorised through the four primary lenses: organisational, social, human, and cultural, without yet applying the critical academic analysis and synthesis that will follow in the Chapter 7.

By presenting the results in this descriptive manner, the study aims to highlight the specific friction points where formal top-down strategies may have been misaligned or clashed with operational necessities and expectations. This approach ensures that the voices of the participants remain the focus point of the research, providing a bottom-up perspective and the practical evidence for potential framework improvements.

6.1. Participant Overview

To provide a transparent context for the insights that were gathered, Table 3 outlines the distribution of the 15 interviews. Participants were identified by a code (P1-P15) to maintain anonymity. The table categorises participants by their role level (leadership team (LT), management team (MT), operational staff) and their legacy organisation (referred to as entity A: the larger initial organisation, and entity B: the smaller initial organisation, as was described in case company chapter). This distinction is important for understanding the different perspectives and dynamics, such as the us vs. them silo mentality and the potential for cultural alienation.

Table 3. Overview of interview participants.

Participant ID	Hierarchical level	Legacy organisation
P1	Operational staff	Entity A
P2	Operational staff	Entity B
P3	Operational staff	Entity B
P4	MT	Entity A
P5	MT	Entity A
P6	Operational staff	Entity A
P7	Operational staff	Entity B
P8	LT	Entity A
P9	Operational staff	Entity A
P10	LT	Entity B
P11	MT	Entity A
P12	LT	Entity A
P13	MT	Entity A
P14	Operational staff	Entity A
P15	Operational staff	Entity A

Note: due to privacy requirements, participant ID's will not be mentioned during in-text quotations.

The participant selection was balanced to the best extend possible. Since the entity B was 4 to 5 times smaller than entity A, the legacy organisations could not be equally represented. Due to privacy issues, the gender division could not be highlighted within the interview participant table. However, for the entity A, the gender division of the participants was represented as: 36% female and 64% male. Whereas, for entity B, the gender division of the participants was represented as: 25% female, 75% male. Making the male/female voices represented for both organisations quite similar. The unequal representation of male and female can be explained due to the market and contextual heritage(s) of the companies.

Note: in-text references to 'insights' can be found in more detail in Appendix 7.

6.2. Organisational Lens: Strategic Distance vs. Operational Complexity

The organizational lens focuses on the formal structures, leadership behaviours, and top-down communication strategies that were taken and implemented during the PMI. The findings in this category suggest - which will be further explained within the following subchapters - that a perceived disconnect emerged between the overarching group's strategic vision and the logistical realities of daily operations, creating a gap between the executive intent and the employee experience.

6.2.1. The perceived impact of strategic distance

One of the most occurring themes identified in the interviews was the perceived 'absence' of leadership (insight 1.1., 5.4., 9.4.). Participants described a leadership layer that remained physically and emotionally distant, often referred to as an 'exclusive club' (insight 13.2.). Employees noted that while top management was busy with high-level synthesis, meetings and strategic planning, they were less than desired seen on the work floor where the actual implementation and integration was taking place. As one employee put it: **'you just don't feel that, at this moment, they really add value to you.'** This physical absence created a state of leadership distance, where the workforce felt they were navigating the transition alone or within their smaller social groups, lacking shared guidance; **'it really felt like everyone was just standing there on their own, and I had to figure it out myself.'**

This lack of visibility had psychological implications for the workforce. When leaders are not perceived as present to provide shared guidance, employees began to feel like an afterthought in the process (insight 10.6.). Interviewees expressed that the initial reassurances given at the start of the merger lost all credibility as there was no visible authority, especially from the top-levels as well as from the overarching group, to back them up as problems arose; **'we are suddenly a big organisation and at the top it is like: you do your job, but no one asks how it is going or if it's even doable.'** This feeling of missing leadership during action led to declining trust levels, as employees were concluding that management either did not care about the operational struggles or were unaware of them; **'you feel a bit betrayed... they are far away when you actually need them.'**

This finding provides a critical real-world view of Bansal's (2019) theory of 'interactional justice'. Bansal argues that employees only accept change if they feel the process is fair and that they are treated with respect. The data shows an additional element; by remaining behind closed doors, leadership unintentionally signalled a lack of interest for the workforce. Furthermore, this result contradicts the optimistic 'success enabling factors' model by Okafor (2019). While Okafor (2019) emphasizes the importance of a 'structural plan for synthesis', the interviews suggest that even the best plan requires leaders to be physically present to coordinate and iterate on common goals and agreements. This aligns with the observations of De Waal et al. (2019), who noted that strategic success is often hindered when leadership is perceived as an exclusive, disconnected group.

6.2.2. The search for clarity

The research indicated a significant information misalignment in how information was shared (insight 5.2.). Participants reported that corporate messaging, top-level as well as from the overarching group, while focused on the positive concepts of synergy and growth, often felt disconnected from the practical challenges that employees were facing. Where top-level messaged a positive note, the employees were challenged with 'broken' tools and the struggle of change and working with new rules and expectations. One participant summarised this clash as: **'they say nothing is really changing... but everthing changed, that statement has completely gone against what we see and experience everyday.'** This participant was not the only one, 14 out of 15 interviewees highlighted this issue with the same quotation. In the end, this communication gap created an information vacuum.

As the formal channels that were provided relied on mass messaging that turned out to be perceived as sometimes impersonal, many employees turned to a gossip economy (insight 4.5.) to find detailed clarity. This informal exchange of information became the primary way and source for most staff to understand the M&As progress: **'people talk a lot, you get this island mentality where everyone fuels each other in a negative spiral.'** Furthermore, some employees felt that their feedback was ignored or neglected (insight 12.5), leading to a state of silenced communication (insight 9.3.).

Also described by multiple participants as: **'if someone tells you to stop talking, well if nothing is done with what you say, you just stop saying anything the next time.'** The perception that feedback is useless, caused a decline in interactional justice, as employees felt their expertise was no longer valued, leading them to withdraw from the communication process entirely.

These findings support the critical success factor identified by Haque (2021), being the need for truthful and transparent communication. A reliance on top-down messaging rather than dialogic communication (Bansal, 2019) unintentionally fostered the very scepticism that slows down integration and change implementation. As Cintron (2020) identified, honest communication is essential for maintaining a sense of fairness during (large-scale) changes, an element that participants were struggling to believe to have been present.

6.2.3. Adjusting to systemic changes

A clear finding within the organisational category was the frustration regarding operational regression (insight 6.3). Participants explained that the merger requested for work methods to move in a different direction, where systems were a struggle for new employees as well as certain current employees leading to the creation of a barrier with existing workflows (insight 3.5.). One interviewee described this as: **'it was really unorganised... you had to figure everything out yourself, and no one really explained how things were supposed to work now.'** This led unintentionally to the creation of inefficient, and chaotic tasks that undermined the progress that was initially booked or expected to be booked. Workflows were more perceived as trouble shooting rather than learning and improving, which a participant summarised as: **'instead of getting better, it felt like we were constantly putting out fires'**. This was coupled with workload intensification (insight 6.4.), where growth targets were increased without a corresponding increase in personnel or tools (insight 12.4).

Management was experienced to be less invested in the technical capabilities of the staff, focusing instead on the higher targets which due to the merger had appeared more than ever. This led to practical disorientation (insight 10.3) where the accumulation of multiple roles or requests, prevented people from focusing on their core tasks. Also mentioned as: **'we just got more and more on our plates, but nothing extra in time or people... at some point you just think, for whom am I actually all of this?'** For many, the new 'stricter' hierarchical structure (insight 3.1.) and system rigidity (insight 11.6) made it increasingly difficult to solve problems creatively. This environment created for some people a negative work atmosphere (insight 5.5.), defined by stress and a drop in motivation, as employees felt they were being set up to 'just follow' the management that was (under)estimating the work reality (insight 12.2).

As mentioned, in some cases, the focus on new strict hierarchical structures and system rigidity made it more difficult for staff to solve problems creatively. These findings support the silo mentality theories of Jeske & Olsen (2024) and Bento et al. (2020), who argue that rigid, formal structures can become barriers that prevent collaboration and knowledge sharing. The data shows that by forcing a 'by-the-numbers' approach (insight 5.10) onto an operationally complex environment, the organisation suffered from systemic integration chaos. This confirms Cintron (2020) warning that ignoring ground-level complexity could lead to structural chaos. This specific finding is one of the primary drivers of the bootlegging principle identified in the framework: when operational practicality fails or lacks behind, employees must break rules to get work done (insight 2.6.) as a way to bypass the system's rigidity and meet their targets. This also supports the view of Armenakis & Harris (1993), who noted that employees will often find informal ways to survive a transition if the formal process does not feel beneficial to their daily work.

6.2.4. The physical limits of growth and implementation

Another primary challenge that was identified was the perceived imbalance in resource capacity management (insight 1.2., 12.4.). While the merger was strategically designed to drive growth, participants reported a significant gap between higher management targets and the actual resources provided to reach them. Participants described a state of workload intensification, where growth goals were increased without a corresponding increase in personnel, time, or (in) tangible tools. A participant highlighted this by: **'I've made so many extra hours, came in on all moments that could, stayed longer, but nothing changed in what I actually got to work with.'** This perceived lack of resource capacity management led directly to an increase in 'negative' work environment (insight 5.5.). Employees reported feeling physically and mentally overloaded and unsupported, which created a consistent sense of pessimism across the teams; **'it started to feel more like a growth-driven burden than an opportunity'**. In many instances, the pressure to maintain day-to-day operational continuity while also engaging in complex integration activities was described as not suitable for the long-term.

Instead of the M&A feeling like an opportunity of growth, for a large group of people, it rather felt as a 'growth-driven burden' that ignored the physical and mental limits of the workforce. This feeling of lack of support caused many individuals to prioritise basic stability over any new innovative ideas, as they simply did not have

the space to contribute to the larger change initiative. This provides insight into the 'resource allocation gap' discussed by Cintron (2020), who argues that management commitment must extend to the physical allocation of resources and training, apart from verbal support. The interviews suggest a strategic plan that felt disconnected from its actual operational capacity. However, important to acknowledge as this disconnect is a common driver for M&A failure rates. From the procedural justice perspective of Bansal (2019), when targets increase without support, it can be perceived as fundamentally unfair, negatively influencing the psychological contract between the employee and the firm, leading to the resistance and ambivalence as was described by Piderit (2000).

Most importantly, this challenge of resource capacity management acts as a direct catalyst for bootlegging. The analysis suggests that when workload intensification occurs in an environment of limited resources, employees do not stop trying to reach their goals, instead they bootleg the process. To meet these higher targets with less perceived resources, employees were forced to find informal ways to achieve results faster, often by cutting corners, bypassing formal approvals, or using unofficial tools. As was mentioned during an interview: **'if we had followed every new rule, half the work would simply not have been done, so you start doing it the old way parallel to it.'** In this defined context, bootlegging is not a choice of rebellion, but a functional necessity derived from resource scarcity. This supports the conclusion that growth-driven initiatives could stagnate or fail if the workforce is left feeling overloaded resulting unintentionally forcing them into informal processes.

6.2.5. Take-aways organisational lens

To summarise the organisational lens, the findings suggest an integration process that was strategically well-aligned in theory but faced significant practical challenges on in practice. The perceived strategic distance of leadership, the information vacuum in communication, and the challenges in resource capacity created an environment of operational friction and disorientation.

These factors demonstrate that the formal organisation is still in the process of providing a stable foundation for potential future M&A and change implementations. This systemic challenge did not result in the total stop of operations, but rather a shift in how work was done. As the formal organisation became more rigid, the lived reality of the employees became increasingly defined by informal networks and bootlegging activities, which served as a vital survival mechanism for the organisation's continuity.

With these insights, we will now delve deeper into the social lens, which explores how the workforce reorganised itself into groups to survive the organisational challenges.

6.3. Social Lens: Fragmentation and Informal Trust Networks

The social lens focuses on the interpersonal and group dynamics that are present or emerged during the PMI. Where the organisational lens focused on the structure and tools of the integration and change implementation, the social lens focuses on the less tangible assets: how people interacted, how they formed relationships, connections, and how they identified themselves in relation to the new situation. The findings of this section suggest that the change, here being the M&A, did not instantly result in a 'united company', rather it struggled and resulted in a fragmented environment of different social groups.

6.3.1. The us vs. them reality

The interviews showed a clear drop in social cohesion across the company (insights 1.5., 6.8.). Instead of a smooth integration of teams, employees described a state of social fragmentation where merging teams, perhaps unconsciously, viewed one another as competition or outsiders rather than partners. During periods of identity threatening situations, like those of change, individuals naturally tend to group with people they already know for safety (insight 2.4.); **'you stay with your own people, because that is where it feels safe'**. This created an increase in the us vs. them mentality which can be seen in comments such as: **'you still hear 'you are from entity X' and 'you are from entity X', it does not really feel like one company yet'**. This fragmentation was connected to increased irritations and a decline in social cohesion, making it more difficult to build a unified group identity in the early phases of the change.

Employees mentioned that they stayed close to their original groups for emotional support, which unintentionally created barriers between the old and the new teams. This silo mentality was not just physical, but also behavioural. Subgroups were less keen on sharing information and knowledge with other parts of the company, viewing different attempts of integration as a threat to their established jobs or social orders. This social divide was active in a way that some interviewees described feeling like 'outsiders' in their own company; 'you stay the person from one of the two entities, that will probably, sadly not change anytime soon'. Resulting to a scenario where teams were, in their own words, **'building walls to protect their own goals and interests'**, instead of building bridges across the M&A struggles and boundaries.

When connecting this social divide finding to literature, it provides a direct real-world application of the Social Identity Theory (SIT) as discussed by Ashforth & Mael (1989) and Hogg et al. (2023). SIT suggests that employees gain their self-perception from the group they belong to, therefore, when a merger threatens that group, they identify even more strongly with their 'ingroup' and view the 'outgroup' less positively. This confirms the thoughts of Cintron (2020) and Smeulders et al. (2023), who argue that a lack of sociocultural integration leads to permanent fragmentation. Additionally, the interviews support Nahavandi & Malekzadeh's (1988) theory on 'acculturation stress', where the clash of two social identities could destroy the value of the M&A.

This social fragmentation is an interesting driver of bootlegging. The research suggests that since formal cross-functional teams were seen as less trustworthy, employees increased in silo-based bootlegging. Instead of collaborating through official integration channels, employees worked with their trusted 'ingroup' to solve problems. They sometimes bypassed the 'outgroup' and the new formal structure as they do not fully trust the new system to protect their interests. In this context, bootlegging became a way for a social group to maintain autonomy and protect their own interests within the dynamic environment of this M&A and its changes.

6.3.2. Functional rule-breaking and trust networks

A key finding from the interviews was the emergence of informal social systems as a primary way work was accomplished (insight 9.6, 15.5.). When official systems and formal reporting lines broke down during the transition or were unclear, work continued through informal trust circles and functional 'rule-breaking' (insight 2.6.). Employees explained they relied on personal trust over systems (insight 1.4.), due to sometimes unclear or unresponsive official channels, as was commented: **'if I would like to know how something works, I don't go through the formal route, I just walk over to the person I trust and ask them'**. This created a resilient social response to the change, where employees focused on informal networks to find the support and information the formal organisation may was lacking to provide.

These informal networks were often led by informal leaders, being the individuals who held the trust of the workforce regardless of their formal power in the new hierarchy. Employees mentioned that they would sometimes bypass management and use these informal trust networks to coordinate work, share resources, and solve logistical problems; **'you just skip the official route, otherwise nothing happens in time'**. This could rationally be described as a positive coping mechanism. Without these informal social actions, the practical disorientation of the merger could have resulted in way more operational failure. However, it also meant that the company experiences more informal operations than one might expect at first.

The findings show the importance of social capital (Helmy et al., 2023) and suggest that when official trust is perceived as broken, informal trust takes over. Trust in the end is the relational base for an organisation. This supports Bento et al.'s (2020) theory that individuals require 'social reinforcement' from colleagues before adopting new behaviours. Furthermore, these insights suggest that the top-level did sometimes neglect or ineffectively anticipated the psychological distance between the workforce and the corporate entity, as was mentioned as an important dimension by Bansal (2019).

From the social insights, this finding of rule-breaking and trust networks is the clearest social link to bootlegging. The analysis showed that bootlegging is a socially reinforced activity. As informal trust networks sometimes viewed the new formal rules as inefficient, informal actions became a more socially accepted behaviour within those networks, allowing employees to bypass system rigidity and maintain operational continuity through unauthorised, but socially accepted actions. Bootlegging was not an isolated act by one person; it was a collective effort to keep the company running; **'it was not a person going rogue, it was something we quietly did together to keep things running'**.

6.3.3. Brain drain accompanied by a silo mentality

The research identified an important social threat regarding the waste of expertise and the associated risk of brain drain (insights 10.5, 2.3.). Employees reported that the merger sometimes, unintentionally, treated specialised skills and organisational knowledge as invisible. Several experienced staff members felt their past achievements were being erased, which lowered their motivation to share knowledge with others; **'it felt like everything we built before suddenly did not count anymore'**. This led to a knowledge transfer barrier where critical information was held back within teams as a form of social protection or job security.

The interviews suggest that silo mentality became a defence mechanism. Employees were reluctant to share resources or information with the 'new side', as they felt undervalued. One participant explained: **'you realise your knowledge is the only leverage you have left, so you do not just give it away anymore.'** Instead of open collaboration, knowledge was guarded within subgroups, contributing to what another respondent described as a **'freeze on innovation'**, where people were too closed off to openly exchange ideas. This meant that the expected M&A synergies remained unrealised to their fullest extent.

These findings provide a strong connection to the human factor in knowledge management (Aichouche et al., 2022; Yeboah, 2023), proving that knowledge sharing is a social interaction that requires motivation. The research shows that when motivation is removed through identity erosion, knowledge transfer is hindered, supporting findings that silo mentality is a threat to organisational performance (Jeske & Olsen, 2024). Furthermore, the results show that the company suffered from the 'paradox of risk' (Asaoka, 2018), where, by focusing primarily on organisation assets, management ignored or misinterpreted the impact of the social assets, which ultimately influences the value of the deal.

In this context, the knowledge barrier resulted in defensive bootlegging, where employees hoarded knowledge to maintain personal security within their silos. These bootlegging activities prevented or even stagnated the organisation from integrating the expertise by rather keeping the protecting one's knowledge. This shows that knowledge sharing is critical for new ideas (Helmy et al., 2023), but in a fragmented social environment, bootlegging is used to keep those ideas private and protected within the silo or even the individual for (social) security purposes.

6.3.4. Acknowledging the past

Different interviews showed a significant impact of the, in this case perceived lack of, legacy acknowledgement (insights 3.4., 10.5.). Employees described a social environment where leadership seemed to prioritise the overarching group and a clean break from the past. Several participants mentioned that it felt like their past work and achievements were no longer relevant in the new structure; **'it was like history was wiped away and we had to prove ourselves all over again'**. This perceived lack of validation had a destructive effect on the social cohesion, causing employees to step back into their silos to protect their professional identity.

The findings suggest that legacy acknowledgement is not just a sentimental acknowledgement, but also a functional one. In the few instances where management recognised a legacy method as important, employees reported being more willing to cooperate. However, where legacy was ignored, the social result was knowledge hoarding. As an interviewee commented: **'if you do not feel seen for what you have delivered, you hold on to your thing even tighter'**. Employees realised that their specialised, legacy expertise was sometimes their only form of leverage in an uncertain environment. Consequently, they guarded this information individually or within their trusted informal networks, preventing the organisation from achieving the synergy it was expecting.

Besides the connection of this finding to the social identity theory (Hogg et al., 2023), suggesting that individuals identify more strongly with their ingroup when they feel their history is under attack. It also connects to principle of interactional justice (Bansal, 2019); when management, even unintentionally erases the past, it impacts the perceived fairness required for social acceptance. The data suggests that social integration cannot be achieved by forcing a 'new' identity. It must be co-created by validating the old one. A lack of legacy acknowledgement and its validation serve as a primary driver for defensive bootlegging, where employees – when feeling their expertise is being underappreciated (insight 12.6.) – engage in informal work specifically to prove that their original ways of working are still superior. Therefore, bootlegging is used to keep their legacy standards alive. The informal preservation ensures the skills survive, but it keeps them hidden from the formal organisation and its processes. This effectively locks the management out from any potential expertise they might desire to gain for the change implementations or future.

6.3.5. Take-aways social lens

The analysis of the social lens showed that a M&As success was often determined not by formal team building, but by the informal trust networks that are present. The findings suggest that social fragmentation is a natural response to top-down integration that may underestimate the importance of legacy. Ultimately, when formal social systems fail to provide safety and validation, the workforce will self-organise into informal ones. The conclusion for the social lens is that synergy is not something top-levels can simply design, it is something that can only emerge when the organisation validates its legacies and acknowledges that these informal social systems are where much of the M&As work actually occurs.

6.4. Human Lens: The Psychological Cost of Change

The human lens focuses on the cognitive and emotional drivers that determine an individual's readiness and reactivity to change. The findings in this category suggest that the merger was perceived not only as a transition of roles, but as a significant disruption of the individual's sense of security, value, and professional identity.

6.4.1. The impact of uncertainty

The interviews highlight a serious state of emotional stress and personal uncertainty across the workforce (insights 10.1., 1.7., 11.2.). Employees described the merger as a period of **'living in constant uncertainty'**, where a lack of clear plans or communicated futures left them feeling lost and alienated. This was not just a temporary reaction to change, but rather a chronic state of internal fatigue caused by sometimes months of role and task ambiguity. Many employees reported that they needed to dedicate a significant portion of their mental energy to processing the changes, leaving less mental energy for their actual job tasks; **'you start to ask yourself: will my job still exist, and what am I even working towards?'**

This state of self-uncertainty led to a noticeable loss of drive. Interviewees expressed they were feeling less of an emotional connection to their work as they did not know if their current role would exist within the upcoming months, weeks, or even days. One interviewee described this as a **'loss of self'**, where the M&A slowly took away their confidence and enthusiasm. This psychological withdrawal was a direct result of the organisation's perceived lack of support to provide a clear path forward.

The finding of experiencing a 'loss of self', confirms the primary psychological driver identified by Hogg et al. (2023) and Khaw et al. (2022): the human need for certainty. As Hofstede (2011) points out, when predictability is removed, it leads to nervous stress and a decline in adaptive functioning. The research suggest that the human factor may have been underestimated, focusing instead on more organisational assets. This resulted in what Nahavandi & Malekzadeh (1988) define as acculturation trauma, where the individual's sense of security is challenged by a lack of the integration management.

When considering the bootlegging principle, bootlegging requires a level of self-efficacy and confidence.

While uncertainty can sometimes drive individuals to improvise, the research suggests that in this context, emotional responses like stress more often led to a freeze on innovation (insight 15.3.). When individuals feel a sense of psychological shock, they are less likely to have the mental space to innovate, instead they prioritise stability and safety (insight 5.8.). From the research insights, the human lens reveals that high stress is a barrier to bootlegging, as employees are often too paralysed by fear to take unauthorised initiative.

6.4.2. The trauma of feeling 'invisible'

During the interviews, different insights highlighted a loss of professional pride and the feeling of being treated as a number (12.6., 10.6.). Experienced staff members reported feeling that their specialised skills, organisational knowledge and contribution were being, perhaps unintentionally, ignored or erased by the new system (insight 3.4.). Employees mentioned that it felt like they had to **'prove their worth all over again to a new management that did not truly know what we have done before'**. This led to a feeling of being unappreciated and unfairly rewarded (insight 1.8.), where employees felt they were giving emotional energy but receiving little recognition in return.

This identity erosion (insight 7.2.) resulted in a state of feeling invisible. Employees felt excluded from decision-making circles (insight 1.9.) and believed that their operational expertise was being undervalued (insight 4.4.). As an interviewee put it: **'you go from being a key person to just another box in a chart'**. This caused a significant decline in professional validation and drive, as staff concluded that their professional self was being replaced by a rigid, more anonymous role within a stricter hierarchical system.

This insight presents a critical view on interactional justice (Bansal, 2019), as employees only accept change if they feel they are treated with dignity and respect. This connects to Ashforth & Mael's (1989) theory that professional identity is a core part of the self-concept. When that identity is perceived as being under threat, it can lead to psychological withdrawal. The research suggest that the case company experienced a part of the paradox of risk (Asaoka, 2019). By ignoring or undermining these human factors, the individual's motivation to contribute to the change implementation was negatively impacted, influencing the M&As success.

While identity erosion negatively impacts proactive innovation, the data suggests it can drive protective bootlegging. Employees who felt invisible often engaged in informal work, quiet resistance (insight 13.4., insight 15.5.), specifically to protect their personal identity or to keep old ways of working alive to prove they still had value. In the case company's context, bootlegging became the way to regain a sense of control and ownership in a system where they felt powerless.

6.4.3. Challenges in psychological safety and communication

A concerning human finding was the perceived hurdle regarding speaking up (insight 2.5.). Employees reported that they were sometimes hesitant to share honest feedback as they worried about potential consequences or simply believed their voice did not matter (insight 12.5.). One person described this as: **'if you get told off for being critical once, you keep your opinion to yourself the next time'**. This led to a state of silenced communication, where both intentional silence and unintentional barriers prevented a true exchange of thoughts and ideas. Employees felt like afterthoughts in the process, leading them to stop trying to help management solve problems, since it felt like they were not serving the common goals anymore.

The research also suggests that many individuals identified a clear need for a more empathetic, human-centred style of leadership (insight 10.7.). Without that, part of the workforce became physically present, but mentally and emotionally absent. As someone mentioned: **'I am here, but I am no longer really involved'**. This human resilience was redirected away from the company's goals and more so towards self-preservation.

This challenge can be seen as a critical effect on the psychological safety (Edmondson, 1999; Newman et al., 2017). The research however presents that the workforce did perceive a hurdle to communication, which supports Piderit's (2000) view of resistance as ambivalence, being a mix of emotions like fear and anxiety. When management instantly perceives input as resistance or neglects feedback, it creates broken trust and an

an increased feeling of betrayal (insight 15.1.) which makes successful integration and change implementation more challenging.

The analysis suggests that in this context, lack of psychological safety did not stop ideas from existing, but it did push them into informal spaces rather than into formal channels. This is a crucial distinction: lack of psychological safety may kill formal innovation, but it does serve as a driver for informal bootlegging, as the official path is being perceived as blocked.

6.4.4. Take-aways human lens

The human lens showed that the individual cost of changes related to a M&A are high. Factors such as (chronic) uncertainty, identity erosion, and a lack of perceived psychological safety can create a vulnerable workforce, where people describe feeling **'drained, insecure and less connected to their job than before'**. In this context, employees often shift their focus from contributing to future improvements towards simply getting through the day, which one interviewee summarised as: **'I am mainly trying to survive the week, not to think about the long term'**.

The human lens shows that bootlegging in an M&A context could have two sides on the one hand stress and fear can block an employee, preventing any form of proactive innovation. Whereas on the other hand, a perceived loss of formal power and voice could stimulate employees to engage in informal actions (defensive bootlegging) to maintain their own sense of worth and operational control; **'if I cannot change it officially, I will just quietly arrange it in my own way'**. This highlights that while the organisational and social lenses show bootlegging as a solution to chaos, the human lens shows it as a symptom of psychological distress. This serves as a step to the next chapter, being the cultural lens, which explores how these human struggles were affected by the cultures of the M&A organisations.

6.5. Cultural Lens: The Cultural Friction and Potential

The cultural lens delves deeper into the soft factors that often determine the success of the organisation. The findings suggest that the M&A involved a perceived 'clash of views', where the values and habits of the two entities were sometimes struggling to align. During struggle of alignment, a state of cultural alienation appeared, where staff felt their local habits, rituals, and professional standards were being replaced or challenged by the foreign, new corporate identity. In this chapter, the different cultural dimensions are described based on the research findings and their connection to academic literature.

6.5.1. The results of a cultural divide

Different interviews highlighted a perceived struggle regarding the system compatibility and divergent organisational styles (insights 3.1., insight 13.5.). The smaller entity, which functioned with a more flat and relational structure, was suddenly absorbed into a stricter hierarchical structure defined by a by-the-numbers management (insight 5.10.). Employees described the original entities' cultures as one of higher visibility, task ownership, and fast adjustments based on direct communication, whereas the now larger entity as it is an M&A of the overarching group is more established and therefore operating in a more corporate manner, which was described as a operationally slower, rule-based, and significantly more impersonal; **'we came from a place where you could walk in and fix things together, and ended up in a world of procedures and boxes you would have to tick'**. This feeling led to operational regression (insight 6.3.), as the staff felt that the new rigid systems were sometimes incompatible with the practical needs of their daily work.

Employees also expressed a deep sense of feeling alienated by the new culture (insight 1.6.). They perceived the new brand and its associated values as foreign compared to the 'family' values both entities held previously; **'I am proud of where I come from, but here I sometimes feel disconnected from what is happening and from what the new owner stands for'**. This cultural friction, or at least the perception of it, was not just about different logos or office layouts, it was also considers the perceived disagreement on how decisions should be

made and how people should be treated, or what they should be responsible for. The results was a culture of quiet resistance, where staff clung to their old styles of working and their social groups as a way to maintain their professional integrity in a system they viewed as culturally challenging.

These findings provide a clear illustration of the 'cultural distance' and 'value misfit' (Smeulders et al., 2023; Weber & Tarba, 2012). They argue that cultural differences in work practices are a primary cause of M&A failure as they increase the cost of integration. The findings suggest that the organisation may have experienced what Nahavandi & Malekzadeh (1988) define as 'forced assimilation', where the acquiring culture is perceived as sometimes neglecting local habits, behaviours, and feelings. This however, contradicts the success enabling factors of Okafor (2019), as the lack of formal cultural alignment meant that the two sides not yet, truly became a united company. Instead, they remained (for a long time) two distinct cultures operating under the same corporate group.

From the research, it can be concluded that bootlegging was initially used to keep the old way of working alive, at least during the start of the integration and during change implementations. In this context, bootlegging is a form of cultural preservation, where employees innovate informally to protect the values and professional standards they feel are at risk; ***we still do it the way we know works, even if officially it should be different***.

6.5.2. Vertical connectivity through the acknowledgement of cultural heritage

A follow-up finding in the cultural category was a perceived disconnect between leaders and staff (insight 14.4.) and a sense that past work and achievements were sometimes being overlooked (insight 3.4.). Participants felt that the new overarching group did not fully acknowledge the legacy culture or the history of the original companies, as an interviewee put it: ***it felt like our story did not really matter anymore in the bigger picture***. This perceived lack of vertical connectivity, being the psychological bridge between the workforce and the corporate group, led to a loss of shared purpose (insight 4.6.), making employees become more reluctant to the company's mission and vision as they felt their own story was being discarded; ***you are told what the new vision is, but you do not recognise your position and yourself in it***.

This identity erosion (insight 7.2.) was intensified by a perceived lack of cultural integration. Management introduced a 'new' identity that felt disconnected and hollow to the staff. This resulted in a state where the workforce felt invisible or not part of the whole (insight 12.6.). Without a sense of belonging to a shared cultural history, some employees withdrew their emotional energy, leading, for example, to a freeze on innovations (insight 15.3.); ***if you do not feel part of it, you stop putting extra energy into it***.

These findings highlight the importance of interactional justice and cultural storytelling (Bansal, 2019), which are essential for the social acceptance of change. The research suggests that by ignoring or neglecting the heritage and values of the original companies, management influenced the relational core of the merged entity and its relation to the larger overarching group (Helmy et al., 2023). This supports Hogg et al.'s (2023) theory that successful implementation requires sociocultural integration that focuses on building a new, unified group, rather than simply, unconsciously, erasing the old one. The different experiences retrieved from the research confirms that cultural sustainability is dependent on this mutual learning, which should be a deep process, rather than a one-time event.

While previous sections saw bootlegging as a survival tool, the cultural lens reveals that a loss of shared purpose can actually limit the motivation to bootleg. Bootlegging is usually driven by a personal passion or a belief in an idea's potential (Mainemelis, 2010). When the culture is perceived as too transactional or 'cold', bootlegging may be replaced by apathy, which is a significant risk for long-term integration and change implementation; ***at some point you just think: why would I still go the extra mile?*** This conclusion is important to consider, since a healthy bootlegging culture actually requires a foundation of cultural engagement, which in the case of this M&A study is at risk.

6.5.3. A cultural rejection of risk and initiative

The research showed a perceived shift towards a more formal and 'cold' organisational structure (insight 11.6), which created a culture where stability priorities (insight 5.8.) appeared to replace risk-taking and innovation. Because the new hierarchy was stricter and more by-the-numbers, employees felt that any new ideas may be unwelcome, perceived as critique, or would be top-down cancelled (insight 15.3); ***you think twice before suggesting something new, because it feels like it will be show down anyway***. This freeze on actions

was a cultural response to an M&A where taking risks for growth may not be at the head of the agenda.

The interviews also presented that creativity was being scraped by the high workload and the system rigidity. Employees felt that they were being asked to do new or different jobs, sometimes, if not often without necessary training (insight 2.10), which left them feeling unprepared and untrained; **'you are given extra tasks, but not the tools or training to do them well'**. In such a culture, the primary goal becomes survival rather than evolution and innovation. This cultural stagnation prevented the organisation from discovering the solutions that would normally arise during a transition or change implementation.

These insights align with theories on uncertainty avoidance (Hofstede, 2011). When a culture is perceived as rigid and rule-bound, it can naturally undermine the independent initiatives needed for innovation. The results also support Aichouche et al.'s (2022) findings that 'cultural capability for change' is essential for adaptability. The case company's shift towards a more transactional culture influenced the psychological safety needed for employees to express themselves. Cintron's (2020) argument that without a learning-oriented mindset, an organisation becomes biased against the transition, making true adaptation difficult, is of key importance to consider for this company.

From the analysis, we can conclude that while operational chaos and social fragmentation trigger bootlegging, a rigid and more cold culture could unintentionally hinder it. For bootlegging to exist, there must be a foundation of cultural alignment and independent initiative (Mainemelis, 2010). The interviews suggest that if the focus becomes too transactional, even the bootlegging activities and mindset will be minimised; **'you move from secretly trying to improve things to just doing what is asked and nothing more'**. This leads to one of the most important conclusions of this research: bootlegging is often a sign of a workforce that still cares, however a shift towards silence and apathy may indicate that this care is fading away.

6.5.4. Take-aways cultural lens

The cultural lens suggests that the merger faced challenges in moving past formal cultural alignment into deep cultural learning. The clash between relational and transactional style created a state of perceived cultural alienation and a freeze on innovation, which some employees described as **'a culture where you keep your head down instead of thinking along'**.

Critically, the culture lens provided two views on the bootlegging principle.

1. Initially, bootlegging served as a way to protect the old culture and professional standards.
2. As the culture was perceived as more rigid, bootlegging was increasingly replaced by a loss of shared purpose and cultural withdrawal.

This shows that bootlegging is not just a structural phenomenon, but a cultural one as well. It thrives in the chaos of the organisational lens, and the trust networks of the social lens, however it is being minimised if not killed by the 'coldness' of a transactional culture. This thought is a first step for the next chapter, where all findings will be synthesised into a final, iterated framework proposal that would be advised to be considered during future M&As or change implementations as it could serve as a base for needed acknowledgements.

6.6. Informal Lens: Informal Adaptive Behaviours

While the four lenses provided an overview of the organisational, social, human, and cultural insights, friction points and opportunities, the most significant discovery, which has already been shortly mentioned throughout the data collection sections, was the presence of a 'hidden, informal' operational engine. Participants frequently described engaging in informal activities that occurred outside the formal integration and change implementation plan, the phenomenon of bootlegging. This section provides more details on this informal parallel system, where employees operated outside formal structures not as an act of resistance, but as a proactive method of managing the systemic complexities and challenges of the M&A.

6.6.1. The emergence of a ‘shadow’ workflow

The data collection revealed that bootlegging was not just a response to technical struggles, it was a structured, unofficial way of working that participants felt was required to maintain professional standards. Employees reported **‘improvising to get things done’** (insight 1.3.) through the development of informal processes, as an interviewee explained; **‘if we had waited for every new procedure to be ready, a lot of work simply would not have been done’**. Employees described how they quietly adjusted workflows, reused legacy methods or created their own checklists to protect the quality during the integration and change implementations. These findings suggest that a significant portion of the M&A’s daily operations was being supported by these unrecorded, informal actions.

This insight clearly highlights a shift to where trust is placed within the organisation. According to the integrative model of organisational trust (Mayer et al., 1995), when formal systems are perceived as lacking the ability to support daily tasks, trust is redirected away from the organisation and placed toward personal, informal relationships (insight 1.4.). The interviews showed a similar pattern: **‘you do not trust the process, you trust the colleague who actually knows how it works’**. By relying on their own tools and trust networks (insight 5.6.), staff were able to bypass what they perceived as system rigidity, creating a hidden layer of productivity that supported the organisation’s formal targets even when the official frameworks were seen as impractical.

6.6.2. Defensive adaptation vs. proactive innovation

Another important insight was the specific nature of the bootlegging observed. While academic literature, such as Criscuolo et al. (2013), often frames bootlegging as a proactive search for innovation, the interviews in this M&A context revealed a more defensive form of bootlegging. Employees described how informal workarounds were primarily used to cope with pressure and conflicting demands rather than to explore entirely new ideas; **‘it was not about fancy innovation, it was about making sure the basics kept running’**.

This suggests that this informal work was a direct response to the growth-driven burden as discussed by the organisational lens. Employees felt that taking personal initiative (insight 4.7.) to work outside the formal lines was the only way to meet high growth targets (insight 12.4.) when resources were perceived as scarce (insight 1.2.). Here, bootlegging was discovered to be an adaptive survival mechanism, a way for individuals to regain a sense of control (insight 5.3.) over their immediate work environment when the formal paths felt blocked or hindered operational efficiency.

6.6.3. The (cultural) visibility gap

The insights retrieved in these informal behaviours also revealed a significant visibility gap between the hierarchical levels. As these informal actions were unauthorised, they remained hidden within the trusted ingroups (insight 9.5.) and were largely excluded from formal reporting. Several employees, from multiple hierarchical levels, indicated that management did not always fully acknowledge how targets were actually reached; **‘on paper it looks fine, but they do not see what we have to do behind the scenes to get there’**. This creates a state of organisational blindness where managements may perceive the integration as successful on paper, while being unaware of the informal effort taken to sustain those results.

This gap illustrates that the new culture of the merged entity was not just a static challenge, but a moving process. The workforce was discovered to create their own ‘interim culture’, one that values realistic pacing and informal trust over the perceived ‘colder’ corporate style of the formal transactional culture. As was mentioned during the interviews: **‘officially everything goes through the system, but in reality we solve most things via our own routs’**. Suggesting that while the formal organisation may have felt silenced (insight 9.3.) or apathetic, the informal organisation was highly active, using bootlegging as a silent method to keep the company functioning.

6.6.4. Take-aways informal lens

The informal, bootlegging insights serves as the final evidence that the M&A’s lived reality was fundamentally different from the formal plan. The interviews revealed a system of parallel realities: the formal strategy that management intended to implement, and the informal, adaptive reality that employees actually lived. One participant captured this duality by saying: **‘there is the world of PowerPoints, and there is the world of how we really do it’**.

These findings, mentioned in this section as well as within the four lenses, suggest that bootlegging is a symptom of a resilient workforce that prioritises individual, social and operational success even when the formal environment is perceived as a hurdle. By documenting these informal behaviours, this section concludes that the research findings, provide the necessary insights and evidence for the critical analysis that will be explained in the next chapter. In this next chapter, the long-term implications of these hidden activities will be discussed.

7. Research Analysis

The objective of this research is to move beyond the descriptive outcomes presented in the previous chapter and engage more so in a critical synthesis of the findings. While the previous chapter explained more in-depth details on the lived reality of the workforce through four different lenses of the conceptual framework, plus a fifth bootlegging lens, this chapter aims to connect those observations to academic theory to understand why the observed challenges and friction points occurred and how they influence the overall success of the post-merger integration. Specifically, this analysis aims to bridge the gap between the executive, top-down intent and the actual operational reality on the work floor.

Initially, the research was guided by a deductive theoretical framework, built on the assumption that formal pillars, being the framework categories and dimensions, would provide the acknowledgement of necessary stability factors for change. However, the qualitative data revealed a complex environment defined by practical disorientation and informal adaptation. As a result, this chapter adopts an inductive lens to reflect upon the originally proposed framework. By using the method of pattern matching, this analysis compares the initial proposed theoretical framework with the empirical observations to identify significant blind spots in the tradition top-down M&A models and the resulting 'organisational blindness' that could occur when leadership is perceived as distant.

A central focus of this chapter is the presence of bootlegging. As was discussed in the findings, the merger appeared to survive its most chaotic phases not purely through the execution of formal plans, but because employees were willing to bypass or iterate upon those plans to maintain operational continuity. This chapter will critically consider this phenomenon, reframing informal actions not as resistance, but as a functional and rational response to structural experienced gaps.

By exploring the causal relationships, this analysis leads to the presentation of an iterated conceptual framework, one that moves away from the idealistic top-down view and more so towards a realistic, human-centred perspective on organisational integration and change implementations. This synthesis provides the foundation for the final conclusions, the design requirements necessary for successful improvements on the current case company's situation, and general future change implementations within the M&A context.

7.1. Synthesis of M&A Bootlegging

The findings of informal workarounds require a critical theoretical synthesis to determine the nature of these practices. While standard organisational literature often views informal work through the lens of innovation or resistance, the research analysis suggests that in the context of an M&A, bootlegging serves a more foundational and paradoxical purpose: it is the primary mechanism for operational survival and an operational reality that sustains the organisation when formal structures are stagnating or being challenged.

7.1.1. Defining M&A bootlegging as a rational necessity

The interviews provided a clear and consistent definition of what bootlegging looks like in this specific M&A context. It was characterised as 'improvising to get things done' (insight 1.3.) and 'breaking the rules to get work done' (insight 2.6.). In contrast to traditional innovation theory, such as the work of Mainemelis (2010), who defines bootlegging as informal work driven primarily by personal passion and curiosity, the research results suggest a different motivator. In the case of M&A change implementations and integrations, bootlegging is driven by rational and pragmatic necessity and acts as an adaptive survival mechanism.

When the new, more rigid structure (insight 11.6.) were perceived as lacking the flexibility to handle the practical chaos and complexity of daily work (insight 10.3.), employees noted that they simply took matters into their own hands (insight 5.6.). This involved using unofficial tools and bypassing formal approval chains to bridge the functional distance between the messaging of the top levels and the reality on the workforce. As Criscuolo et al. (2013) mentioned, bootlegging often occurs when formal structures are perceived as too bureaucratic to support immediate objectives. Globocnik et al. (2022) further supports this by suggesting that bootlegging behaviour emerges as a direct response to perceived gaps in formal management controls. In this context, bootlegging was not a 'hobby' or interest, it was a core operational strategy used to prevent and handle with operational struggles during a period where leadership was often experienced as absent.

7.1.2. The integration conflict

While bootlegging provided the short-term stability needed to survive the PMI phase, the analysis indicate that it simultaneously creates a significant integration conflict. As these actions are informal and most of the time hidden, management remains blind to the way in which work is actually being performed. This confirms the research gap: formal change management rates often struggle, or even fail, as it ignores the informal actions that determine the true degree of successful implementation and integration.

If these informal initiatives are not recognised, the synergy that management hoped for may never be fully realised. This created, as was also highlighted by the interviewees, a perceived freeze on innovation, as there was no formal mechanism to capture the informal breakthroughs occurring in the silos. The paradox identified here is that while bootlegging held the company together during the practical chaos, it also created a barrier to formal synergy by locking important practices away in informal trust networks. This confirms the silo-busting theory of De Waal et al. (2019), which highlighted that when formal collaboration fails, employees will use their own social capital to navigate the organisation unofficially, keeping the resulting expertise hidden from the corporate core.

7.1.3. Survival vs. success

When considering whether bootlegging leads to larger chances of M&A success, the research analysis suggests a distinction between survival and success. From the gathered data, bootlegging mainly leads to survival. As noted by Zhao et al. (2025), for a merger to be truly successful, management must be able to identify and accept promising bootlegging projects so they can be integrated into the formal strategy.

Currently, the findings suggest that the drivers of stress and neglect have redirected bootlegging away from initial growth-oriented innovation toward simple improvisation. This aligns with the human lens finding that chronic stress or uncertainty can act as an innovation killer. In a successful merger, bootlegging should be an inspired form of innovation, however in the context of an M&A, it was a necessary survival tool created by different aspects such as a perceived lack of resource capacity (tangible and intangible). From the perspective of Piderit (2000), this shift from innovation to survival indicates a clash between psychological agreements, where employees prioritise personal and operational stability over corporate evolution. For the organisation to move past survival, it must address the visibility gap and create a culture where the informal initiatives of a resilient workforce can be acknowledged and eventually captured as organic solutions for future change.

7.2. The Integration Chain Reactions

The findings described in the previous chapters represent a series of interconnected causal relationships. By analysing these findings through a system-thinking and bootlegging lens, it is possible to observe how certain organisational conditions initiate specific reactions across the organisational, human, social, and cultural dimensions of a company within the PMI phase. These relationships show that the practical chaos experienced on the work floor is the result of systemic friction points that come to play when a significant distance exists between top-down strategic planning and bottom-up operational reality.

7.2.1. Leadership distance as root cause

To understand why the integration has encountered these specific friction points, it is necessary to identify the root cause, which has been found to be: leadership distance. As was shown in the research results, this distance is both tangible (physical absence from the work floor) and intangible (cognitive disconnect between top-level and operational staff). This distance is the starting point of the chains that strongly influence the integration and change implementations of the merger, since it prevents leaderships from witnessing the operational truth and therefore acting upon reality rather than theory.

Top-level designs strategic implications and expectations without the complete understanding of ground-level complexity. As they are not always present to observe the limitations of current tools or the psychological toll of the merger, it is easy to assume the formal system is sufficient. This gap of vertical connectivity however ensures that the top-down vision and bottom-up reality remain non-aligned. Without this perceived distance, being connectivity, the resulting information vacuums and experienced system rigidities would be visible and fixable. However, the current experienced distance, if continued as it occurs now, could persist and trigger the causal chains explained below.

7.2.2. The credibility gap

The first causal relationship (see Figure 14) focuses on the flow of information and leadership credibility. Hierarchical distance serves as a strong driver for an information vacuum when formal channels are perceived by the employees as infrequent or impersonal, resulting in a struggle to provide the clarity required and expected during integration and change.

The workforce often feels that the integration is 'just moving' and that the communication is too impersonal to be relatable. Rather than feeling like a part of the new, united group, employees feel a lack of bond with the new situation. According to the theory of interactional justice (Bansal, 2019), when communication lacks a human, relatable connection, it creates scepticism, which was found in the research results. This triggers a reliance on the gossip economy as employees seek more information from their peers (informational

bootlegging). This reliance leads to a larger credibility gap, resulting in a state of scepticism and broken trust. This lack of trust ensures that staff remain emotionally disconnected from the new organisation and its scenario, which in turn reinforces the original leadership distance as communication becomes even more one-sided.

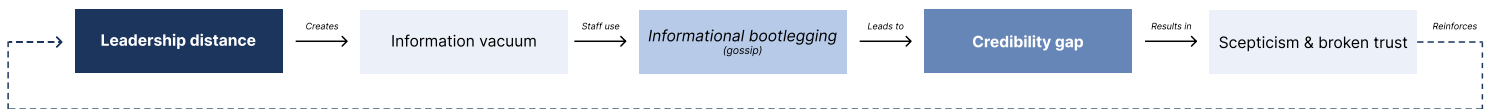


Figure 14: Feedback loop: credibility gap.

7.2.3. The synergy gap

The second observed chain reaction (see Figure 15) shows how leadership distance affects the realisation of strategic M&A objectives. The research findings regarding the earlier mentioned employee’s feeling of invisibility, suggest that the distance between levels lead to identity erosion. When employees feel their unique skills and professional legacy are no longer relevant or recognised, they conclude that their professional worth is under tension.

This perceived identity erosion stimulates a defensive social response: knowledge bootlegging. Rather than collaborating through formal, cross-functional channels, employees work informally with trusted peers to solve problems. When considering the Social Identity Theory (Hogg et al., 2023), individuals who feel their ability is threatened will step back into their familiar social groups for protection. This results in knowledge hoarding and the formation of silos as employees seek to protect their value and job security. The resulting synergy gap creates a permanent knowledge transfer barrier. Ultimately, this social retreat prevents or even blocks formal synergy from happening, ensuring that the intended efficiency gains of the M&A remain unachieved.

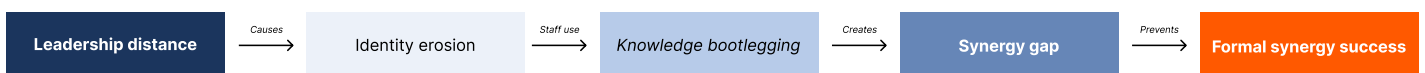


Figure 15: Feedback loop: synergy gap.

7.2.4. The execution gap

The third observed causal chain (see Figure 16) identifies the conditions that involve informal work. Due to the present leadership distance, management (on all levels; group and internally) sometimes create work expectations that are experienced by the employees as unclear. These expectations are set without doublechecking if the employees have the capacity to meet them. Therefore, these set targets may clash with the system rigidity and resources that are (un)available.

This clash creates an execution gap, resulting in operational regression where work becomes slower and more chaotic. To maintain productivity and meet expectations, the workforce is operating through defensive bootlegging, using shortcuts. While these actions create operational survival, they are largely hidden by the visibility gap. This gap represents the mismatch between what the top-down sees (success on paper) and what the bottom-up experiences (the reality). As operations continue to function, higher hierarchical levels remains unaware of the friction points, as employees are not formally providing feedback due to the causals of the other causal chains, which reinforces the leadership distance and the top-down belief that no changes are needed.

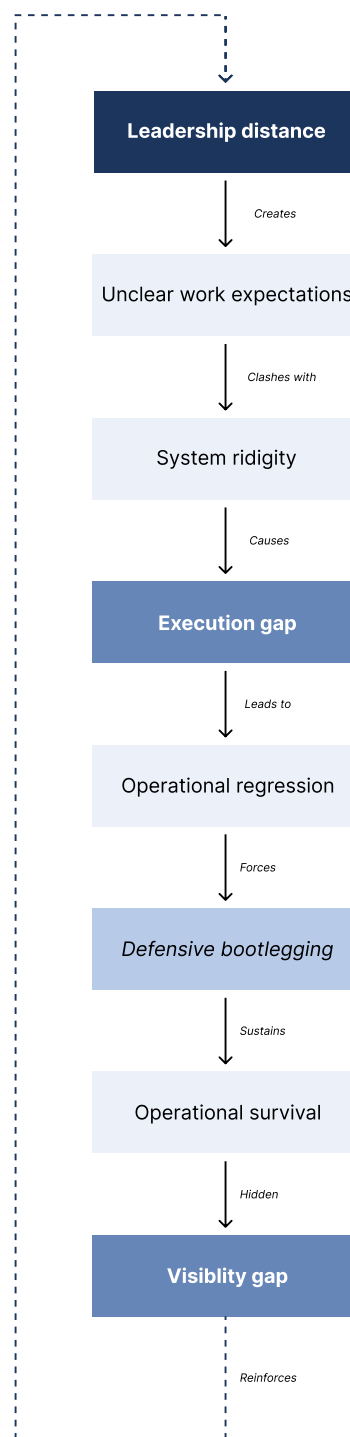
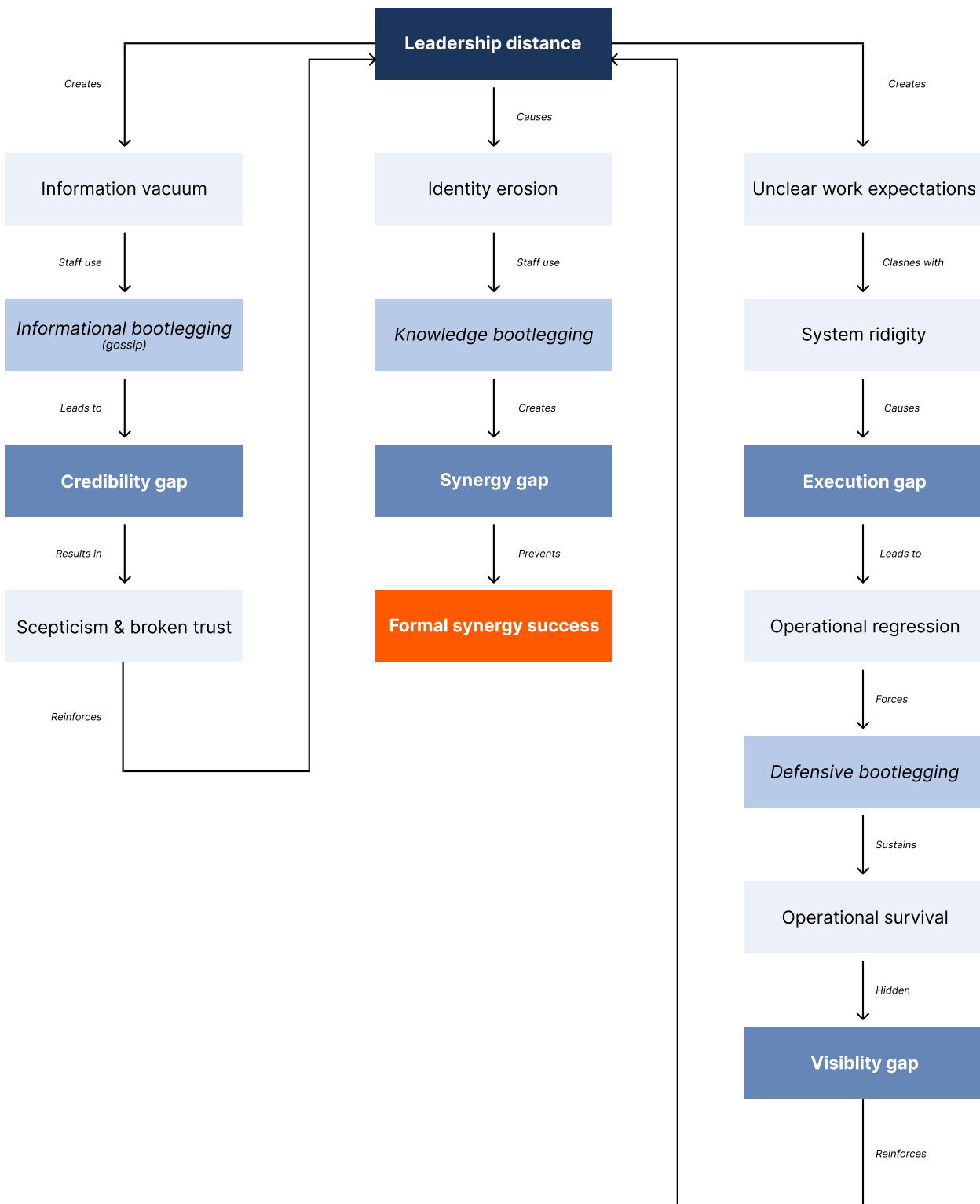


Figure 16: Feedback loop: execution and visibility gap.

7.2.5. The systemic feedback loop: the 4-gap model

The three causal chains described above are interconnected components of a larger systemic cycle. The correlation between these chains reveals a self-sustaining feedback loop (see Figure 17). Leadership distance has been identified to be at the base of all three causal chains. This flowchart, from now on referred to as the '4-gap model' provides a visual representation of the lived reality of the work floor.

The system is to be reinforcing as long as the different gaps are not tackled. As employees bootleg their information, collaboration, and daily tasks to survive, the organisation appears stable from the top-down perspective. This lack on perceived reality prevents the top-level teams from seeing the necessity for internal organisational change and adjustments, thereby further reinforcing the distance between the employees, teams, operational levels, structures, and so on.



- Root cause
- Follow-up responses
- Bootlegging practices
- Gap
- Challenged M&A goal

Figure 17: Negative feedback loop: the 4-gap model.

7.3. Moving Towards a Desired State

From this analysis, clear implications regarding the current state of the PMI were drawn. These implications summarise the points of struggle, challenge or attention identified throughout the research and define the necessary shifts required to move from the current situation, sustained by various forms of bootlegging, towards a positive reinforcing feedback loop. Therefore, the acknowledgement of these causal relationships together with the created framework provide a strong base for the creation of a strategic plan which will be discussed in the later chapters.

7.3.1. Implication 1: communication as a core struggle

As was identified, nearly all organisational struggles have been based somewhere in the lacking of communication. This is not merely an internal company challenge, it is a multi-layered disconnect between the overarching group, the local management, and the workforce. The strategic vision provided by the overarching group and further down communicated by managerial layers, is often perceived by the employees as disconnected from their views or moving at a too strong pace. This struggle of relatability and paced communication is one of the reasonings for why the leadership distance is so critical to consider. As long as the vertical connectivity, as well as the horizontal connectivity, is not what it should be, leadership is unable to witness the operational reality and the workforce is unable to influence the strategy. Without fixing the communication flow within all levels of the organisation, as well as the connectedness with the overarching group, the distance between the top and bottom levels of the organisation will remain a challenge and hurdle.

7.3.2. Implication 2: resolving the visibility gap

Secondly, to achieve a desired positive feedback loop, the research presents another significant struggle to a successful change implementation: the visibility gap. As employees often engage in defensive bootlegging to meet targets and 'survive' the day, management remains blind or unknown to the true operational challenges at play. Currently, the lived reality remains in the background, while the strategic top-down views, including the ones from the overarching group, remain focused on targeted KPIs. Therefore, to conclude as long as this gap exists, management will continue to set expectations based on an illusion of stability, unintentionally ignoring real-time experiences and possibilities. Breaking this loop requires a formal mechanism to dig deeper and identify the operational reality, ensuring that the top-down and bottom-up perspectives are aligned through constant multi-level connectivity.

7.3.3. Implication 3: rebuilding the human bond and trust

Trust has been identified as the relational foundation that has sadly been under increased struggle. The research suggest that the credibility gap is not just a lack of data, but a lack of a relatable bond with the new organisation and scenario. Staff experiences corporate messaging as one-way, leading to informational and knowledge bootlegging as they retreat to their silos for clarity. Trust cannot be rebuilt through top-down messaging alone, it requires visible connectivity that demonstrates care for the employees' struggles and the alignment between messaging and reality. A successful integration and change implementation readiness depends on re-establishing this human connection to validate the staff perspectives and history, both internally and in relation to the overarching group.

7.3.4. Implication 4: the need for a desired state

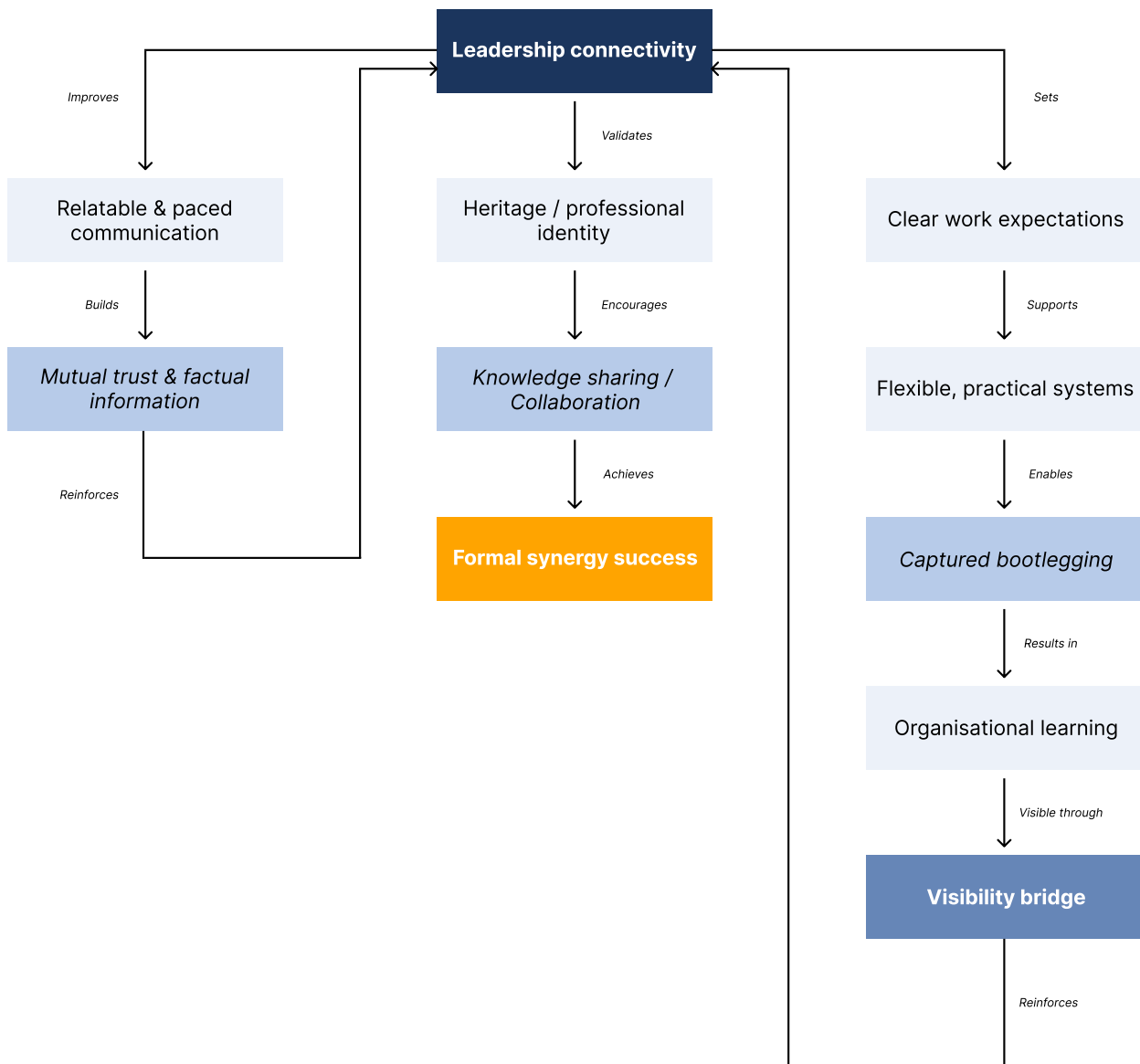
To move from survival to success, the organisation must move from the current 'negative' 4gap model into a positive feedback loop of M&A synergy and success. As shown in Figure 18 this desired state aims to replace the leadership distance with leadership connectivity. By improving the communication flow across all levels, the organisation could transform bootlegging practices into drivers of growth.

In this positive feedback loop, the organisation would be desired to move:

- From informational to dialogic trust: relatable and correctly paced communication (internal and the overarching group) will have a more positive impact on psychological safety, limiting reliance on the different forms of bootlegging.
- From knowledge hoarding to collaboration: validating the in-house capital of the workforce encourages knowledge sharing, which will minimise silos and achieve formal synergy successes.

From defensive to captured bootlegging: when leadership is more open to, and acknowledges the operational truth, they could set realistic and validated expectations. Which helps closing the execution gap and will allow for captured practices.

Captured bootlegging: *informal, previously hidden practices that are made visible, discussed, and selectively integrated into formal systems so the organisation could learn from them.*



- Root cause
- Follow-up responses
- 'Formal' bootlegging practices
- Bridge
- M&A goal

Figure 18: Desired positive feedback loop.

8. Proposed Framework

Where all insights have been gathered, analysed and conclusions were drawn, this section will provide a structured conclusion which would be recommended to use when evaluating the current situation, future integration or change implementations, being the revised framework (see Table 4). This framework represents a significant iteration on the initially proposed conceptual framework. While the different presented causal chains provided a dynamic view of the organisational process, this framework will step back to its base, presenting a model that provides the specific categories and dimensions required to ensure stable integration or change implementation.

Where the initially proposed framework was created through deductive literature research, this revised version is a synthesis of those academic findings and the inductive, data insights gathered from the 15 in-depth semi structured interviews, providing the connection to the real-life perspective. By merging these two perspectives, the framework is aimed to provide a tool that identifies the critical factors determining change readiness and implementation success, elements that at all time should be acknowledged and considered.

8.1. From Deductive Theory to Inductive Practice

Before moving more in depth on the specific changes that were made to the framework, it is essential to address the reasoning for this iteration. The initial framework (see Table 1) was built upon the identified academic knowledge and advice, assuming that if these were acknowledged and followed, change implementation were expected to have larger success rates. However, qualitative data showed that these theoretical models often overlook the practical disorientation and the informal practices present during change implementations within the M&A context.

Reflection on the initial framework was therefore necessary, as the data showed that the most significant factors in the M&A's success were not only the formal plans that were top-down being implemented, but also the informal, bottom-up responses employees created to navigate formal instabilities. As a result, the framework was iterated to move from an abstract description of 'what is hoped to happen' to a realistic explanation of 'what will actually be occurring'. This iteration ensures the framework to act as a bridge between high-level strategy and the lived operational truth, addressing the dimensions which, if ignored, become the primary drivers for potential implementation failure.

8.2. Adopting a Bottom-up Perspective

Perhaps the most significant iteration on the framework is the move from a top-down strategic perspective to a bottom-up view. The initial framework assumed that the formal structure was the primary engine of change, when managed correct, the desired goals would be achieved. The interviews, however, revealed that when formal systems fail to acknowledge operational complexity and true impacts, the informal becomes the foundation for organisational survival. By incorporating the view that informal networks and peer trust are the base of the actual implementation success and change readiness, if not the glue of an organisation, the framework now provides a tool to understand the required stability factors from the perspective of those executing it. In the end, the people are the ones making the change. This perspective is crucial for identifying the gaps that otherwise would be invisible or overlooked by top management.

8.3. Refining the Framework

A second adjustment was the evaluation of the titles that were used. This was done to move away from the previously somewhat abstract corporate terminology and toward an operational reality. The findings showed that the initial titles were too broad to capture the essence of the specific friction points of change implementation. The changed titles are:

8.3.1. Leadership and vision → Leadership visibility

The focus shifted from the simple existence of a clear vision to the physical and emotional presence of leaders. Regarding of what the vision is, change acknowledges that interactional justice during change requires leaders to be seen witnessing the operational struggle rather than remaining external, or purely strategically implementing what they believe to be the future.

8.3.2. Structure and operational frameworks → Operational practicality

The initial title focused on the formal design of the structure and operations. The new title emphasises the pragmatic fit. In the end, a system is only successful if it actually works for daily operations, rather than just appearing theoretically correct in a strategic and operational manual.

8.3.3. Formal cultural alignment → System compatibility

Alignment often implies a completed state or harmony. The research, however showed there to be a large chance for cultural clashes, mainly when cultural systems do not match. System compatibility is believed to better describe the active need to ensure corporate rules do not break old, efficient habits and legacy operations without first consulting the expected outcomes and impacts.

8.4. Considering the M&A & Bootlegging Context

To make the framework embedded within the M&A context, several dimensions were added or refined to identify the specific triggers of bootlegging within this context. These additions acknowledge that informal work is a functional response to specific potentially occurring gaps.

8.4.1. New factors

- **Resource and capacity management:** originally a sub-factor, this was made a standalone factor as work(load) expectations were identified as an important driver in the 4-gap model. Now, it focuses on the importance of evaluating whether targets are humanly achievable given current resources.
- **Legacy acknowledgement:** the initial framework focused on building a 'new' identity. This new factor was added as research showed that the perceived erasure of the past causes identity erosion and knowledge hoarding. Validating and acknowledging heritage, on whatever level, should therefore be clearly recognised as a functional requirement to achieve synergy, stability and change readiness.

8.4.2. Interpersonal relationships and influence → Informational social systems

This factor was changed to better acknowledge that when formal news fails or lacks behind, employees will bootleg information through the gossip economy. This ensures the framework acknowledges and therefore top levels will measure informal trust as the foundation for communication.

8.5. Human and Cultural Refinements

The final changes that were made to the proposed framework addresses the psychological safety and vertical connectivity required to prevent the silent communication, operational regression, and loss of motivation of the workforce.

8.5.1. Motivation and behavioural choice → Psychological safety and voice

The data shifted the focus more towards the fear of speaking up, being an underlying factor, strongly influencing employee behaviour and motivation. This dimension now clearly addresses the need for psychological safety to end the silence that among other things fuel the credibility, synergy, execution, and visibility gap.

8.5.2. Skills, training, and confidence → Professional identity and validation

Participants mentioned they did not just need skills, training and confidence, they also requested for their existing expertise to be respected. This iteration on the framework ensures for them to feel valued rather than a number.

8.5.3. Collective cultural identity and group relations → Vertical connectivity

This final changed dimension was evaluated to more specifically address the critical finding that leadership distance remains present if top and bottom levels are not aligned on expectations, values, and so on. This dimension is significantly important to consider, as when overlooked when considering change implementation or evaluation, it could cause organisational blindness.

8.6. A Tool for Risk Mitigation, Integration & Change Implementation

The iteration that was conducted on the initial framework ensures that it is no longer a too idealistic, top-down list of dimensions, but rather a realistic tool where real-time bottom-up impacts are considered. This structural shift acknowledges that the success of a change implementation strongly relies on the human, social, cultural and informal factors that traditional academic models often simplify.

While the framework offers a valuable perspective for the case company to understand its ongoing integration challenges, its primary purpose is to serve as a diagnostic and advisory tool for future change implementations of any size. The research shows that the current organisational state was largely created due to the somewhat neglect or misperception of these 14 factors during the initial phases of the M&A. As a result, by identifying and paying attention to these critical dimensions, the framework (Table 4, presented on the next page) could serve as a guide for risk mitigation, ensuring that top-down strategic implications are closer related to the lived impact as well as providing an evaluation tool for future organisational change readiness. Where the description of the framework is based on the research analysis, it is also academically connected to current known academic research.

Table 4: Framework part 1.

Category	Dimension	Managerial Aim	Description
1.Organisational	1.1. Leadership visibility	To ensure management is physically present to explain the potential insecurities, and build trust.	Strategic success is often hindered when leadership is experienced as, or behaves like an exclusive group, remaining behind closed doors while the workforce navigates the transition (alone). While top-level decisions are the engine of change (Bansal, 2019; Cintron 2020), implementation fails when leaders are not physically present to coordinate common goals and remain flexible and communicative to shifting plans (De Waal et al., 2019). Without this presence, initial reassurances lose credibility, creating a disconnect between executive intent and operational reality.
	1.2.Operational practicality	To make sure tools and rules actually work for daily jobs.	Existing company structures can become rigid barriers to change integration and implementation if they do not account for the 'practical chaos' of daily work (Jeske & Olsen, 2024; Okafor, 2019). When high-level strategy neglects or ignores practical as well as technical capabilities, it could trigger operational regression, where new tools may clash with legacy tasks and force staff into inefficient work. A successful transition requires a pragmatic fit between the new organisational strategy and the capabilities and preconditions of the workflow.
	1.3.Communication transparency	To prevent rumours by communication truthful, in time, and frequent.	Bansal (2019) and Haque (2021) identify truthful, transparent communication as the base for employee trust during the merger. When official channels fall silent or provide only 'overly grand' or unbelievable messaging, an 'information vacuum' can be created, which is quickly filled by gossip and rumours. Maximising participation is recognised as best practice (Cintron, 2020), however this only occurs when information flows are honest enough to prevent the skepticism that follows false, inconsistent, or unbelievable reassurances.
	1.4.Resource capacity and management	To ensure staff have the right tools and time to meet (new) targets.	A primary threat to change implementation is 'workload intensification', where growth targets are increased without a connected increase in personnel or tools. Management commitment must acknowledge and anticipate the proper allocation of resources (Cintron, 2020; De Waal et al., 2019), ensuring the organisation's strategic plan does not become disconnected from its actual operational capacity. Growth-driven work is expected to fail when the workforce is left overloaded and unsupported, leading to a less positive work climate.
2.Social	2.1.Group cohesion	To limit the us vs. them mentality by building a new shared identity that stimulates collaboration and cooperation.	During periods of identity-threatening change, individuals naturally retreat to groups they know (silos) for safety (Hogg et al., 2023). This results in 'social fragmentation', where merging teams view one another as competition or outsiders rather than partners (Smeulders et al., 2023). To illuminate this, sociocultural integration must focus on building unified affective bonds that replace fragmentation with a shared sense of belonging.
	2.2.Informal social networks	To understand how personal relationships, social influences, and informal trust networks guide group behaviour (especially when formal systems may be lacking).	Trust is the key relational core of an organisation that undergoes or will experience change (Helmy et al., 2023). When official systems break down during the transition, work often continues through informal trust circles and functional 'rule-breaking'. As individuals require social reinforcement from colleagues before adopting new behaviours (Bento et al., 2020), identifying prototypical leaders, those who best embody the group's identity, is essential for guiding the collective flow of knowledge, collaboration and cooperation.
	2.3. Knowledge preservation	To limit the functional or structural barriers that prevent the effective sharing of knowledge and specialised skills.	Knowledge sharing is a social interaction involving the exchange of specialised skills across the firm (Aichouche et al., 2022). However, silos often block this flow, leading to potential permanent 'brain drain' where critical expertise is treated as unimportant or invisible (De Waal et al., 2019; Jeske & Olsen, 2024). Strategic success depends on motivating original knowledge sources to transfer their expertise to the new entity before it is lost to turnover or withdrawal.
	2.4. Legacy acknowledgement / context	To manage the experiences and potential 'scars' from previous experiences.	The history of an organisation or its people act as an important lens through which new changes are perceived, as an example past trauma or uncertainty both creating legacy scars. If employees expect negative consequences based on prior knowledge or experience or if the consequences are vague and unknown, there is a high chance they will perceive new strategic goals as threatening rather than an opportunity (Khaw et al., 2022). Managing the context is key, as a collective team that feels tired and skeptical will likely withdraw from the change implementation process to protect themselves.

Table 4.: Framework part 2.

Category	Dimension	Managerial Aim	Description
3.Human	3.1.Individual psychological state and security	To handle the insecurities of not knowing what the future holds.	Human functioning is initially tied to the reduction of self-uncertainty and a need for predictability (Hogg et al., 2023). A lack of clear rules or roles during change relates directly to negative emotions and internal fatigue (Hofstede, 2011). Individuals often experience a state of shock or alienation when their roles become ambiguous or less intellectually challenging, which leads to a loss of personal drive and a feeling of 'lost' within the new structure.
	3.2.Psychological safety and voice	To make it feel safe for people to speak up without fear of potential consequences.	Newman et al. (2017) defines psychological safety as 'the belief that taking an interpersonal risk will not lead to negative consequences'. The individual's choice between offering a voice or remaining silent depends entirely on this perception. Change implementation stagnates or even declines when employees believe their feedback or perspective is 'useless' or when they fear corporate consequences. Whereas, as was mentioned by Bento et al. (2020), when feedback is perceived as possible and listened to, individual empowerment positively impacts the high performance required for successful change.
	3.3. Professional identity and validation	To respect an employee's history and expertise.	Yeboah (2023) stated that self-efficacy, being 'an individual's confidence in their own abilities', is one of the primary human drivers for managing new situations. Change is more likely to be accepted as a positive challenge when the new situation validates the employee's institutional knowledge as well as their professional expertise (Hogg et al., 2023). If experienced staff feel they have been turned into a number, or that their past achievements are being erased, their motivation to contribute and cooperate to the new change limits or even disappears.
4.Culture	4.1. System compatibility	To make sure the 'new' culture does not break the old work style and old culture.	Weber & Tarba (2012) mention that cultural differences in work practices significantly impact performance and are a leading cause of M&A failure. Successful integration requires the intentional alignment of beliefs, production processes, and technical systems (Cintron, 2020; Smeulders et al., 2023). Systemic (cultural) friction could occur, when a new systemic style is forced onto an initial different systemic cultural style. In this case a rigid 'by-the-numbers' transactional style is forced onto a previously relational or flexible culture, causing operational regression and a clash with professional standards and expectations.
	4.2. Vertical connectivity	To bridge the psychological distance between the work force and the corporate group.	Trust serves as a relational core element that connects the local workforce to the more distant corporate entity (Helmy et al., 2023). Building a shared identity requires connecting and communicating values in a way that creates a positive, tangible, and connected atmosphere rather than feeling disconnected and separated entities, due to lack of value acknowledgement or misinterpretation (Bansal, 2019; Hogg et al., 2023). Strategic change implementation is to be negatively impacted when major shifts lack a human connection to the workforce, requiring management to restore a sense of shared purpose across all levels.
	4.3. Adaptive mindset	To create a culture that is open to learning and fairness.	Cultural sustainability is dependent on adaptive learning and organisational flexibility (Hofstede, 2011). Cintron (2020) argues that this integration must be treated as a process of deep cultural learning rather than a one-time event. Honest and transparent communication is the only way to ensure 'interactional justice', the perception that the change is fair (Bansal, 2019). Without this perceived fairness, the culture remains biased against the transition, making true adaptation impossible.

9.Design Implications

In this chapter, the findings from the research analysis and the proposed framework are translated into concrete design implications. The goal of this chapter is to highlight what the identified gaps and different dynamics mean for future integration and change implementations. These implications form an important link and base between the 4-gap model, the revised framework, and the strategic activities which will be discussed in the next chapter.

Based on the transition from the current 4-gap model feedback loop to the desired reinforcing feedback loop, any future plan or intervention, based on the data should therefore meet the following identified design considerations:

- **Multi-level connectivity**

The organisation must try to establish formal, transparent channels for communication between the overarching group, the company, and the operational team. Leadership teams (including managers) must be able to observe the operational truth with an open mind, without fear, ensuring strategy is informed by actual experiences, possibilities, and created with (the impact on) all stakeholders in mind.

- **Relatable and paced communication**

Communication should move away from the impersonal mass-messaging. Updates must be paced to match the workforce's experience and reflect their views and values to rebuild the human bond with the new structure and organisation.

- **Heritage validation and professional identity**

Formal recognition of the skills and legacies is essential to minimise silos and move from knowledge bootlegging towards open collaboration and communication, consequently creating a positive impact on the hierarchical distances.

- **Operational and pragmatic fit**

Work expectations must be aligned with actual operational possibilities, requirements, expectations, and vision(s). New systems must be co-evaluated for their pragmatic fit with the all stakeholders that would be impacted directly and indirectly, in order to transform defensive survival into captured bootlegging.

- **Psychological safety for learning**

The overarching group should stimulate and provide its organisations with the reinforcement to create an environment where staff feels safe to share their thoughts, informal breakthroughs, feedback, as well as providing employees with clear growth opportunities, value and something to work for, ensuring that the positive feedback loop remains self-sustaining.

Part 2: Practice

10.Design Methodology

This chapter explains which steps were taken for the research insights to be translated into a future-oriented strategic plan. Two main design methods were used: co-creation and roadmapping. Co-creation was used first to explore what employees from different hierarchical layers expect and need at this moment in time, focusing on solution spaces. Roadmapping then organized these expectations, together with the previous data insights and the revised framework, into a coherent, time-based strategic plan. In this way, the proposed strategic roadmap is explicitly based on both the empirical data and the voices of the people who will experience the future changes.

10.1. Co-Creation

10.1.1. What is co-creation?

Co-creation refers to design activities in which people who are affected by the designed solution take an active role in shaping possible solutions instead of being involved only as respondents or end-users. Sanders and Stappers (2012) describe co-creation as a method in which designers and stakeholders collaboratively explore problems and opportunities, combining theoretical knowledge with lived experiences. In organisational settings, co-creation workshops are used to bring different perspectives together, build shared understanding, and collectively explore options for change (Salmi & Mattelmäki, 2019).

In this thesis, co-creation was used as an intermediate step between the analysis and roadmapping. Considering the insights from the data analysis and the need for a plan, a co-creation session was conducted to make sure the strategic design proposal would reflect not only what would theoretically be seen as a solution, but most importantly would be expected from the organization.

10.1.2. Focus of the co-creation sessions

The co-creation session was explicitly focused on the present situation and near future. Participants were invited to react to certain questions such as: what they expect from the organization and its leaders at this moment in time, what they would like to see differently, when or how they feel acknowledged, how information is communicated and what helps or hinders their understanding of the plan and work expectations.

The emphasis of the co-creation session was the 'what now?' rather than re-analysing the past. This framing is in line with co-creation practice, where participants are encouraged to move from problem spaces to solution spaces (Sanders & Stappers, 2012; Visser et al., 2005). It allowed participants to connect key impact factors such as leadership distance, information vacuums, silo mentality, and bootlegging, with concrete wishes for improvement, such as visible leadership, more honest and paced communication, more room for collaboration, and alignment between expectations and resources.

As a result, the co-creation session did not serve to validate something that has already been designed. Instead, it generated content that later shaped the focus and direction for the proposed strategic plan.

10.1.3. Reasoning for co-creation in this phase

The decision to introduce a co-creation session at this point of the project is directly linked to the research results. The interviews showed strong feelings of distance, invisibility and a lack of voice. Many employees felt that decisions were taken without real considerations and that their daily reality remained unseen. Co-creation offers a methodological response to this situation.

There are three main reasons why co-creation was considered as interesting for this research phase. First, inviting employees to share what they expect now and what they desire to see differently is a concrete way to provide them a voice in the design of their future, not only in the description of the past, aligning with participatory design principles (Sanders & Stappers, 2012). Secondly, early co-creation prevents the roadmap from becoming a purely top-down plan. As employees are given the opportunity to contribute before the strategic plan is created, some of the trust and ownership that has faded away during the integration was acknowledged. Third, the questions used in the session form a bridge between implications and design. They connect analytical findings to possible directions for change and produce an output that could later inform the structuring of the strategic roadmap.

10.1.4. Goals and output of co-creation

Within the overall research and strategic design process, the co-creation session had four clear goals:

1. To gather a clear picture of what employees currently expect from leadership and the organization.
2. To understand what employees want to see changed in communication, collaboration, and support.
3. To collect ideas for possible interventions that feel realistic and meaningful from the bottom-up perspective.
4. To identify perceived risks and prerequisites, such as time constraints, workload, fear of speaking up, that should be considered when designing a strategic plan.

The outputs were therefore qualitative. They consisted of clustered notes (see Appendix 9 and 10) and verbal insights that captured the employees' expectations and suggestions. These outputs were analysed together with the interview findings and the revised framework, after which they were used as input for the strategic design phase to determine the focus, pacing, and content of the plan. In this way, co-creation functions as the link between the empirical understandings and strategic design, helping to ensure that the later strategic roadmap is both analytically as well as practically relatable and recognizable for the people who will be living and working with the results and potential consequences.

10.2. Roadmapping

10.2.1. What is roadmapping?

In this thesis, roadmapping is approached from a design roadmapping perspective. Simonse (2017) defines design roadmapping as a visual and strategic tool that helps organisations 'create a future vision, frame the time pacing and map the pathways towards it'. Rather than being a detailed project schedule, a design roadmap provides an overview of how different aspects, initiatives, and developments relate to each other over time, and how they collectively contribute to a long-term intent.

Design roadmapping typically combines three core activities: mapping the current and future scenario, its pacing, and visualizing the needed steps to achieve this desired future scenario. In doing so, it supports executives, leaders, personnel, designers and whoever may be of interest for understanding the plan, in aligning short-term actions with long-term ambitions and in communicating this alignment in a clear and accessible way.

This research uses design roadmapping to connect the current post-merger situation to its desired future state. The roadmap therefore does not focus on technologies or products, but on organisational capabilities, human and social factors, and cultural conditions.

10.2.2. Strategic roadmap

Strategic roadmapping provides the overall structure of the proposed initiative. Based on the data analysis, the revised framework, and the expectations gathered in the co-creation, three time-based steps, so-called horizons, were created. Each horizon represents a phase to move from the current state to the desired future state.

At this level, roadmapping is used to understand and acknowledge what should request priority at which moment in time. The four gaps identified in the 4-gap model (see Figure 17) are not treated as separate issues but are implemented in a way that considers their causal relationships. For example consider problems related to leadership distance and communication, which must be addressed before deeper cultural implementation becomes realistic. Strategic roadmapping is therefore the translation of a complex set of findings into a phased storyline: first stabilise certain foundations, then build on them, and finally learn and improve even further.

The main output of the strategic roadmap is to identify what the steps should be and in which order to be able to implement the set future vision. The more in-depth insights on these steps are described in the strategic and tactical roadmap chapter.

10.2.3. Tactical roadmap

Tactical roadmapping, compared to strategic roadmapping, adds an extra layer of detail based on the earlier created more holistic, strategic roadmap. Whereas the strategic level answers 'in which order should we move?', the tactical level answers 'what kind of work, resources, stakeholders and all relevant elements belong in each phase?'. In line with Simons's (2017) view that design roadmaps consist of multiple layers, the tactical roadmap in this research provides the detailed build up of the strategic plan.

At this level, the roadmap links the integration gaps and co-creation expectations to action points. For example, the tactical layer indicates that work on leadership presence and dialogic communication are important for an early phase, while work on embedding learning routines may be of relevance later on. It also clarifies how certain action points prepare the base for others, for example, how increasing visibility and trust make it easier to engage employees in cross-disciplinary collaboration at a later stage.

The output of the tactical roadmap is a set of aspects with brief descriptions of what should be developed and considered for each phase to move the organization and its people along the mapped road. These action points serve as a design brief and important implications for the organisation. More in-depth details will be provided in later chapters, explaining the design of the horizons and final roadmap.

10.3. Connecting Analysis, Co-Creation and Roadmapping

The creation and development of a strategic plan is followed according to a step-by-step approach. Three stages build upon each other, in the end leading to an actionable and realistic strategic plan.

The first step was the analysis of the interviews. Considering the organisational, social, human, and cultural lenses, the empirical materials and findings were translated into key friction points and conclusions such as the root cause of leadership distance, corresponding bootlegging activities, and the four identified consequential gaps. This stage resulted in the revised framework and the identification on what should be bridged to create a desired organisational future.

The second step was the co-creation of expectations and needs. After the analysis, co-creation sessions explored what employees currently expect from the organisation, what they would like to see differently, and which first steps they would consider to be realistic. Participants mentioned concrete wishes based on asked questions. In line with academic insights on literature, this step moved from describing problems towards imagining preferred futures and solutions together (Sanders & Stappers, 2012; Visser et al., 2005).

The third step is design roadmapping. Here, the analytical insights and the co-creation outcomes are brought together into a clearly structured strategic plan. Following the design roadmapping approach, a future vision is determined, the overall time horizon is divided into a smaller number of achievable horizons, and a path is mapped from the current state to the desired organisational scenario. The four gaps that were identified, together with the created framework provide the analytical foundation, while the co-creation results add a focus and perceived relevance for each horizon and its details and action points.

To conclude, the strategic and tactical roadmap arise from the integration of these three steps: analysis clarifies what is happening, co-creation clarifies what stakeholders need or desire, and design roadmapping aligns these insights over time into a coherent, future-oriented plan.



Figure 19: Data base for strategic plan.

10.4. Overview of Strategic Design Process

As can be seen in Figure 19 a summarisation is provided to show the connection between the main steps of the design methodology ultimately leading to the proposed strategic plan.

On the left, the analysis step represents the qualitative interviews, the created framework and feedback loops and gaps, capturing what is currently happening in the organisation and where the main friction points are to be present.

The second block, co-creation, presents the sessions in which employees were asked questions on what they would expect from the organisation and its leaders at this moment in time. Also, they provided insights on what they would like to see differently, and which next steps they consider to be realistic, making sure the analytical insights are translated into concrete implications, wishes, and perceived conditions for future change.

The third block, design roadmapping, represents the phase in which analytical data and co-creation insights are combined into a time-based plan. The final block visually indicates that the strategic and tactical roadmap are the outcome of these different components, rather than using them as individual methods.

11.Co-Creation Sessions

xxThis chapter describes how co-creation sessions were used to translate theory into practice. This was done by directly involving different stakeholders to question, and together shape what should happen next. It shows how people with the real-time experience of the integration and change implementations would 'solve' or tackle certain situations, providing them with a voice for input on the strategic plan, resulting in a more collaborative and valid proposition.

The chapter explains more on the session design, prompts, and practical set-up after which the participant group and the reasoning behind involving different hierarchical layers was discussed. Finally, it explains how the outcomes were analysed and presents the main results, forming direct input for the future plan.

11.1. Session Design and Set-up

Building upon the earlier explanation of co-creation in the design methodology chapter, this section describes how the co-creation sessions in this study were organised and conducted. The aim of these sessions was to explore what employees currently expect from the organisation in perspective to future changes, what they would like to see done differently, and which first steps they consider realistic and necessary.

Two separate sessions were conducted, one with employees from the operational level and one with employees from the managerial level. This separation was considered based on the hierarchical distance and psychological safety as was considered to be extra important due to the interview findings. By working in relatable hierarchical groups, participants were expected to speak more freely about sensitive topics and their thoughts without their direct manager or team member being present. Within each session, attention and consideration was paid to a mix of legacy (entity A and B), gender, and functional backgrounds to avoid one-sided perspectives.

Both sessions used the same basic structure. Participants were informed about the session, what is expected of them and the formal scope (see Appendix 8 and 9). After the practicalities, a scenario was sketched; 'imagine there is a change coming that will most likely affect your work'. From there, they worked with a set of incomplete statements, so-called prompts, that invited them to respond from their own perspective. The prompts were translated into English for reporting but were originally presented in Dutch to match daily practice. The questions that were used can be seen in Table 5.

In addition to the change focused statements, a specific prompt about the present was included ('given your current experience with change... If I could change something in this moment, it would be...'). This question was intended to give participants space to first write down current experiences and frustrations or tensions, so that these could be acknowledged and then redirected into concrete wishes for improvement rather than remaining (unspoken) irritations. Also, it provided people with a 'clean slate' to continue looking at the future, instead of the past.

Participants answered these prompts by writing on post-its. For each statement they were given a fixed amount of time to write down all thoughts, feelings, examples, wishes, and concerns that would come to mind. When time was up, they passed their sheet to another person in the group, who read the previous answers and added their own point of view. In this way each prompt collected multiple answers and became a multi-level, co-written perspective of the group, while still starting from personal voices and opinions. After everyone answered the different prompts, selected prompts were briefly discussed in the group to clarify or deepen remarks. During the sessions, some blank pages were kept for additional questions that emerged from the conversations. These extra questions followed topics that appeared frequently in the written input and allowed for deepening, as it clearly showed to be relevant to the group.

Important to note is that the wording of some prompts was slightly adapted per session to match the hierarchical position ('As an employee...' vs. 'As a manager...'), however the underlying question remained unchanged. This allowed for later comparison between how operational staff and managerial staff.

11.2. Prompt Set-up

The different prompts used for the sessions were developed by translating qualitative data insights into concrete, answerable questions that speak directly to the earlier identified gaps from the 4-gap model (Figure 17). Each prompt consists of a short change-related scenario and an unfinished sentence, so participants are directed to finish it in their own words. This way of asking, aligns with the context mapping idea of using simple, carefully designed materials to help people express experiences and needs that are not always easily voiced in formal conversations (Visser et al., 2005). In this way, the prompts were both a data gathering tool as well as a first step towards potential design implications, surfacing patterns that can later be used in the roadmap.

Each prompt was designed carefully. To understand the prompts, the data gap it focuses on, and its goal and reasoning, please see Table 5 for more information.

Table 5: Co-creation prompts and argumentation.

Prompt	Data gap(s)	Connection to data insights	Prompt intention	Reasoning
<i>'For me, a good connection with my manager means...'</i>	Credibility gap	Leadership distance; Lack of visible guidance	What people expect from their manager(s) in terms of presence, behaviour and support	The credibility gap derives from the struggle of believing what is vocalised top-down as daily reality is experienced differently. This prompt asks what a real connection with leaders should be like, so that messages and decisions could become believable again.
<i>'For me a good connection with my team means...'</i>	Synergy gap	Social fragmentation; Us vs. them mentality; Reduced social cohesion	What people need from their team to feel supported and to work together	The synergy gap shows that the merger does not yet feel like 'a group', and rather as a separated entity. This prompt focuses on what good collaboration and togetherness mean in practice, which is a basic condition for real synergy.
<i>'During work I notice my input is valued when...'</i> (employee)	Synergy gap	Feeling invisible; Lack of recognition; Erosion of professional identity	Concrete moments when employees feel seen, listened to and taken seriously	The visibility gap showed that the contribution of people from the work force is experienced to not be fully acknowledged or noticed. By asking when they do feel valued, this prompt provides clarity on what should happen more often to close the gap.
<i>'During work I notice my input is valued when...'</i> (manager)	Visibility gap	Vertical connectivity between with higher leadership(s); Voice	When managers feel recognised and included by higher leadership	The visibility gap also affects managers, who often feel stuck between strategy and operations. This prompt shows how they experience being valued from a higher hierarchical level, which is important for improving the whole chain of visibility.
<i>'For this change, I need support and insights regarding...'</i>	Execution gap	Uncertainty; Information vacuum; Resource and capacity concerns	What people are missing in terms of information, tools, and support to make the change workable	The execution gap is the distance between strategy, targets and the operational reality. This prompt turns this broad issue into a more concrete list of needs that could be acted upon later in the roadmap.
<i>'I would like to share my ideas by means of / with...'</i>	Credibility & Visibility gap	Silenced communication; Fear of speaking up; Reliance on informal networks	How and with whom people feel safe to share ideas	Many ideas now stay within the informal trust circles instead of reaching top-level decision-makers. This prompt shows which channels and relationships feel safe, so the organisation could design involvement methods that people would actually use.
<i>'I accept and understand information when it is shared...'</i>	Credibility gap	Misalignment in corporate messaging; Scepticism towards top-down communication and approach	Conditions that make change related information clear and trustworthy (who says it, when, how)	The credibility gap is strengthened by communication that feels one-sided or unrealistic. This prompt directly asks what makes information acceptable and understandable, giving concrete guidelines for future communication.

The answers to these different prompts would create a picture of how employees and managers experience and would like to shape change, which can be clustered and translated into conditions and potential implications for the later to be designed roadmap. This combination of slightly different, but comparable prompts aligns with the context mapping principle that research materials should be tuned on the lived world and role of different stakeholders, while together providing a coherent view of the broader context (Visser et al., 2005).

11.3. Format Argumentation

The format for the co-creation was chosen as a response to the social and psychological conditions that emerged from the interview insights. Employees described that they were careful about speaking up in formal meetings and often shared their honest views only in small, trusted circles, while still wishing to influence how future changes and decisions are formed and introduced. Under these circumstances, a classic open discussion or focus group would risk reproducing existing hesitation or potential silence, instead of surfacing the true experiences that are crucial for this research.

To lower this struggle, the sessions were set up as a context mapping inspired generative session. Context mapping is a design research method in which participants use creative or structured prompts to express their thoughts, experiences, and needs regarding a specific topic. These insights are then used as input for human focused solutions (Visser et al., 2005). Generative sessions within this approach refers to carefully designed tools, such as the incomplete sentences or mapping exercises, to not only understand what people need, but also what they feel and hope for, including their tacit and latent knowledge (Sanders & Stappers, 2012). This principle of generative sessions was used as inspiration and logic behind the design of the written, scenario-based prompts used in the co-creation sessions.

The written scenarios were chosen to provide each participant with a space to formulate their own ideas and thoughts, without the immediate pressure of group dynamics. Completing statements such as 'for me, a good connection with my manager means...', helped to make implicit expectations explicit and concrete. This is in line with the generative principle that people need guidance and certain tools to reflect their own experiences and to access deeper layers of what matters to them in a certain context (Visser et al., 2005). In this way, the co-creation method directly acknowledges and addresses the earlier findings that employees struggle(d) to voice needs around recognition, communication and support in formal settings, even if these issues are frequently appearing in their daily operations.

Passing the prompt papers to another participant added an extra layer that fits the context mapping idea of sharing and building on each other's materials. In the sessions, participants could see how colleagues had responded to the same situations and were stimulated to add comments, confirmations, and questions. This created a form of indirect dialogue. People discovered similarities and differences on their experiences and definitions without having to actively explain or defend themselves. Given the strong fragmentation and us vs. them perceptions identified in the research, this multi perspective exercise was a nice starting point for the subtle introduction of awareness of other viewpoints while keeping psychological safety high. Like context mapping, the insights provided a broader perspective on the current situation and future change implementations.

Another element within the co-creation session was the assurance of slightly different prompts ('as a manager' / 'as an employee') for different hierarchical participants. The interviews showed that both groups experience same type of elements, but in a slightly different way, making it an interesting situation. Role specific but parallel questions let participants reflect from their own perspective, which was later used to compare how both roles view these prompts to bring the multiple lived realities into one shared overview for the strategy design. This strongly connects with the need for connectivity by making similarities and gaps between expectations and desires between different levels visible, relatable and connected.

The sequence of questions was also intentionally differentiated for the managers' group and the operational staff group, to align with their position in the change process. For the managerial group, the emphasis was on

interpreting the current situation and their role providing direction and information. They were therefore asked about the present, what a good connection with their own manager and team means to them, when their input feels validated, under which circumstances they understand information, and which support and services they desire. For the operational staff group, the emphasis was more on experienced support and voice. They were asked about the present, their needs for support and service, when their work feels validated, what a good connection with their manager means, under which circumstances they accept and understand information, and how and with whom they would like to share their ideas. This differentiation allowed both groups to reflect from their own perspectives, while still working with comparable themes and gaps that could later be analysed and collectively concluded.

Finally, the format of the co-creation session was chosen since it provides, as was mentioned before, direct input for the roadmapping phase. The prompts are future oriented, asking what is perceived as difficult, what is needed, how people desire to be involved, and under which conditions they accept certain change related information. This combination of past experiences and future perspectives forms a solid base for patterns and potential design directions, which could then be translated into conditions and interventions for the strategic plan, for example regarding leadership behaviour, collaboration requests or communication style.

To conclude, the sessions can be explained as a context mapping inspired co-creation session. Generative prompts were used to gain experiences and expectations regarding change in a psychologically safe way, while at the same time generating clear and concrete future-oriented input for the roadmap. This decision fits the sensitive organisational context of PMI and supports the aim of this research to gain an understanding of the gap between lived reality practices and strategic intent.

11.4. Pilot

Before running the two co-creation sessions, the scenario and prompts were tested with four external individuals from different ages and no affiliation with the case company. The goal of this small pilot was to check whether:

- The proposed scenario was immediately recognisable and understandable.
- The prompts were clear and not overly leading.
- The number of prompts and the timing per round were realistic.

Based on this test, minor adjustments were made, for example simplifying some phrases and clearly explaining that answers could be written as keywords or short sentences, without needing to be perfect. This step helped to ensure that, during the actual co-creation sessions, participants could focus on content rather than figuring out what was expected from them.

11.5. Participants

Participants for both sessions were selected with reasoning, deriving from the same organisational context as the interview sample. The aim was not statistical representatives, but richness and diversity of perspectives, open conversations and retrieving perspectives from individuals that may not always feel the most strongly heard. For each session, the following criteria were considered:

- Hierarchical level (operational and managerial, matching for the corresponding session)
- Legacy entity (A and B represented)
- Gender balance as far as possible, within the constraints of volunteering and available employees
- Involvement in or impact from post-merger changes

In total, 6 participants joined the sessions, due to timebound difficulty and experienced work pressures, 4 of the employees were managerial level, whereas 2 were participants from the earlier sample group were operational staff. The results of these sessions and their analysis will be discussed in the next sections.

11.6. Analysis

The analysis of the co-creation session was analysed in a step-by-step approach (see Appendix 10).

First, all written inputs from the two sessions were brought together per prompt. This means that answers from operational staff and managerial level were merged whenever they responded to the same question (for example 'for me a good connection with my manager means...'). Working per prompt ensured that inputs were always compared within the same context and intention of the question, rather than across different topics.

Secondly, within each prompt, the combined post-ids were scanned for statements that referred to the same underlying topic, as was done like the thematic analysis used within the interviews. Inputs that were expressing a similar idea were grouped. Each of these groups of related inputs was then given a short descriptive cluster name that captures their shared meaning. At this stage, the work remained close to the surface level of the data. The focus was on naming what people talked about, not yet on interpreting why this mattered.

Third, after all prompts had been clustered, the list of cluster names was reviewed across the prompts to find similar patterns that returned in multiple questions and are therefore considered to be relevant for the design of the strategic plan. From this, conclusions were drawn about these core insights. These conclusions did not add new coding steps but simply summarised what the individual clusters together were saying, creating the design implications from the co-creation sessions.

11.7. Results

The co-creation session was set up to understand and explore how employees from different hierarchical levels themselves describe the conditions under which they would expect to work 'well' given future change(s). By combining the answers from both groups per prompt and clustering similar statements, a coherent understanding was sketched around the core prompt topics: the present situation, connection with manager and team, appreciation of input, support and communication needs for change, and conditions for sharing ideas. See Appendix 9 and 10 for a visual representation on the method and mentioned statements.

11.7.1. Present situation: what should change now

When considering the recent change experiences, participants frequently point to a number of structural issues that they would like to see changed first. They mention a lack of clarity around leadership, responsibilities, and expectations, and call for 'a clear organisational chart' and 'more structured management team meetings' so that it would become more obvious who is responsible and who decides what. They also express a clear concern regarding knowledge loss: handovers 'are not done well', 'internal training is limited' and 'expertise is fading over time'.

At the same time, they see weaknesses in cross-department (company level and group level) collaboration and planning. Communication between departments, involvement of different stakeholder layers and updates on planning are mentioned as areas for improvement, with the managerial layers expected to 'understand the complete picture' and share it. Finally, participants clearly link the structural issues to both vision and daily work conditions. They desire a clear view of 'what we want to develop' and 'how the overarching group impacts them', but also practical improvements on the (link between) offices, parking and equipment, together with tools such as feedback forms to capture how changes are experienced bottom-up.

11.7.2. Connection with manager (and team)

When describing a good connection with their manager, participants emphasise that mutual trust, approachability and clear guidance are key. They value managers who 'give them trust', 'stand up for me', 'know what is going on', and 'provide clarity' while taking decisions when needed. A personal element is also important. People desire to be involved in what seems for them as important topics (both ways), asked for their opinion and able to have 'real contact when needed', including on more personal topics.

For a good connection with their team, they describe similar elements. A good connection for them means 'a good workflow in the department', the team working well together and constructive collaboration with other (group) departments. It also involves an empowering working environment where the team supports each other, can take decisions together and feels mutual trust. Open, honest contact and the possibility to ask for help are seen as essential for handling change together rather than individually.

11.7.3. When input feels appreciated

Participants notice that their input is valued when it leads to visible outcomes and clear follow-up. They mention situations where they 'see the results in behaviour, input and output', when 'something is done with it', or when they 'see their input is implemented' and receive feedback or questions on the input/output. Being invited back into conversations is equally important. People feel appreciated when they are 'included in future meetings', 'asked again to think along next time' or 'involved in the solution'. Appreciation is also connected to how input is treated in the moment. There are clear needs to have the freedom and space to contribute, receive constructive responses instead of immediate resistance, and time to explore ideas, stimulated by a manager who shows interest, gives feedback and sometimes simply offers a compliment.

11.7.4. Communication and support

Regarding an upcoming change, participants mainly desire clarity regarding (personal) impact, direction, and access to support. They desire to understand what the change means for their own role, for their department and for colleagues, and ask for a concrete (frequently updated) timelines, plans of approach, expectations for their role and the reasons behind these decisions. In addition, they desire to know where they could go with questions: a clear contact person, a 'helpdesk' for the change, dedicated sessions to ask questions (from the start) and regular feedback on how things are going. Participants also provided more insights into how and when information should be shared: 'in an open tone', 'without necessary distinctions between people', in 'clear, retrievable formats such as concise presentations and well-written emails', 'during structured moments like meetings' and 'at the right time', 'once there is sufficient clarity, not in fragments', 'with periodic updates' and 'dedicated time rather than in passing'.

11.7.5. Barriers to knowing the situation and knowledge sharing

Participants also identified different elements they believe to keep managers from fully knowing and understanding what is truly happening. They describe one-sided choices, where the management team(s) 'chooses to present the department or the top management, not representing both', and filtering that turns 'messaging into overly top-down or overly practical translations focusing on side issues or responsible reactions instead of the core struggle'. Participants also question the perceived payoff of attention to the work floor, using statements such as 'what is in it for me?' when describing leadership interest in issues.

When explaining what holds them back from sharing their thoughts, knowledge, and feedback, participants mention to their experiences of 'too often a no', 'limited room for discussion', and a declining sense of purpose ('what are we still working for?', 'put more into boxes, less goal/purpose'). They also describe an increasing distance between roles and a weakening of team feeling and responsibility. Less 'give and take', 'fewer moments to share', and 'reduced sense of shared ownership of problems and solutions'.

11.8. Conclusions & Strategic Considerations

Overall, the co-creation results show that employees and managers are capable of formulating what they desire and need from future changes when they are given structured prompts and a safe setting to do so. The clusters clearly describe that relations and their quality, structural basics, the way communication channels are designed, and a space for voice are not separate topics, rather they are interconnected conditions that determine whether people feel able and willing to support organisational change. An important observation from the conversations is that, as the researcher was considered to be an external party, employee mentioned to feel more free and 'open and really share their thoughts and concerns'. This suggests that future change dialogues may benefit from neutral facilitation to lower the perceived risk and encourage honest input.

First, the sessions confirm that trusted relationships with managers and teams are a starting point rather than an add-on. Trust, accessibility, clear guidance, and genuine interest are frequently described as the base on which people are prepared to accept difficult decisions and (extra) work. Secondly, participants clearly mention that role clarity, basic structures, and solid knowledge transfer should be in place before additional change is added. Otherwise, new initiatives are experienced as extra weight on an already struggling system. Third, they describe in practical terms what good and credible communication for them looks like: impact specific, coherent, retrievable, and shared at appropriate moments and levels. Fourth, they show that recognition and voice must be built into everyday routines, so that sharing ideas becomes worth it again and does not depend on isolated practices or personal efforts. Finally, the results show that strategic direction must be aligned with human real-time experiences at work. If goals and values are unclear, if everyday irritations are ignored, or if people feel put into boxes with narrow roles, motivation and cooperation significantly drops.

In this sense, the co-creation outcomes do not propose completely new themes or dimensions, they rather sharpen and prioritise what needs to change first and how it should be experienced on the work floor. They provide a direct translation of the found gaps and theoretical concepts into more concrete design criteria for the strategic plan.

The core **takeaways** from the co-creation sessions could be describes as:

- Build change on visible, trusted, and approachable leadership and strong team relations.
- Stabilise roles, structures and knowledge flows before adding new change.
- Design change communication as an ongoing, impact specific and retrievable process.
- Implement recognition and employee voice in regular routines with clear follow-up.
- Align strategic direction with everyday work reality, motivation, and values.

Part 3: Strategy

12.Strategic Roadmap

This chapter proposes and discusses the strategic design implications and corresponding designed strategic roadmap, providing a concrete, time paced path in order to build a stable, change-ready organisation. It presents how the case company, or any other company facing comparable struggles could move from the current situation towards the desired state.

The overall vision and argumentation for the strategic plan will be discussed first, after which more details will be provided on the different horizons and their key interventions in order to provide a clear direction of what should be done when, why and how.

The previously described findings revealed that the PMI and change implementation are currently being sustained by a 'negative' feedback loop, referred to as the 4-gap model (Figure 17), in which leadership distance, information vacuums, social fragmentation, and cultural friction stimulate different types of bootlegging, which are occurring as a strong survival mechanism. To move towards a desired state - the positive feedback loop - a strategic roadmap was created that translates the framework (Table 4) and different insights and outputs into a phased, realistic plan that is grounded in the interviews, research analysis and co-creation sessions. One that takes approximately 30 months (2.5 years) to fundamentally reach its desired vision. The roadmap consists of three horizons: (1) see and be seen, (2) connect and co-create, (3) embed and evolve. Each horizon is grounded in specific values, addresses the earlier identified gaps (visibility, credibility, synergy, execution), and builds the preconditions for the follow-up horizon, making sure the strategic choices are strongly connected to the daily reality and motivation of employees, as was highlighted in the co-creation sessions. Important to note is that even though a next step may be taken into the follow-up horizon, it remains important to continue with elements of the previous horizon. Horizons are not just a follow-up, but rather of parallel importance.

The roadmap is not intended as a rigid implementation plan, but as a strategic guide that indicates which values, design challenges, and interventions must be prioritised in which order. As such, it follows the bottom-up perspective that emerged from all the data, as was concluded, change is only sustainable when the lived reality of employees is structurally acknowledged and connected to the top-down strategy and when communication, recognition, and workability are taken seriously.

To understand each step of the strategic roadmap (see Figure 21), the strategic design implications together with a step-by-step roadmap explanation will be provided. Each step of the roadmap will be presented in detail, reflecting the three different horizons and consequential future vision. The future vision functions as the desired end goal of the strategic plan and will therefore be discussed straight after the strategic design implications, this in order to guarantee a logical understanding of the future before the in-depth step-by-step horizon approach.

12.1. Strategic Design Implications

The interviews, literature, and co-creation together provide a clear explanation of the current situation and challenges. It can be concluded that the organisation could only move forward if future changes are designed around three foundational elements: good relationships, a solid structure, transparent communication, all which its people trust and 'own'. The four identified gaps still show to be of great importance, the co-creation session mainly made them more concrete and practical.

First, trusted and approachable leadership must be tackled. People mentioned clearly that they are more willing to go along with change when their manager and team feel close, honest, and supportive. When this feeling is missing or lacking, new initiatives quickly feel like 'just another change' on top of everything else. The future should therefore include visible acknowledgement and plans on leadership presence and team connection.

Secondly, the basics of the organisation must be in order. Many comments point to unclear roles, lack of knowledge transfer and meetings that do not yet provide the overview that is desired. This makes change feel messy and heavy. Early steps in a strategic plan should therefore focus on clarifying who is responsible for what, improving cooperation structures and protecting key knowledge, before adding new aspects or projects.

Third, communication is key. Right now, messages are often experienced as fragmented or not fully in line with daily reality. At the same time, employees explain exactly what would help: clear information on their own work, simple timelines and plans, understandable reasonings for decisions, and updates that are easy to find and come at the right moment. Communication in the strategic plan should therefore be set up as a continuous process of clear agreements, not as one-sided announcements.

Fourth, recognition and voice should be part of the daily operations. People desire to see what happens with their ideas, be invited back into conversations, and have space to think along. If they mostly hear 'no' or 'don't get involved' or feel there is no room to discuss, they stop speaking up. The strategic plan should build in regular, low-threshold ways to share input and show what is done with it.

Finally, strategy must connect to everyday work life. Participants judge plans through questions such as: is my workload realistic? What is in it for me? Do basic things like workspace and tools make sense? Do I understand what we are working towards? When long-term goals are linked to visible improvements and fair choices, people are more willing to invest in change.

In short, the strategic plan that follows should show how the organisation will (see Figure 20):

- Strengthen leadership and team relations
- Stabilise roles and structures
- Set up reliable change communication
- Build in recognition and voice
- Link strategic choices to the daily reality and motivation of the people doing the work

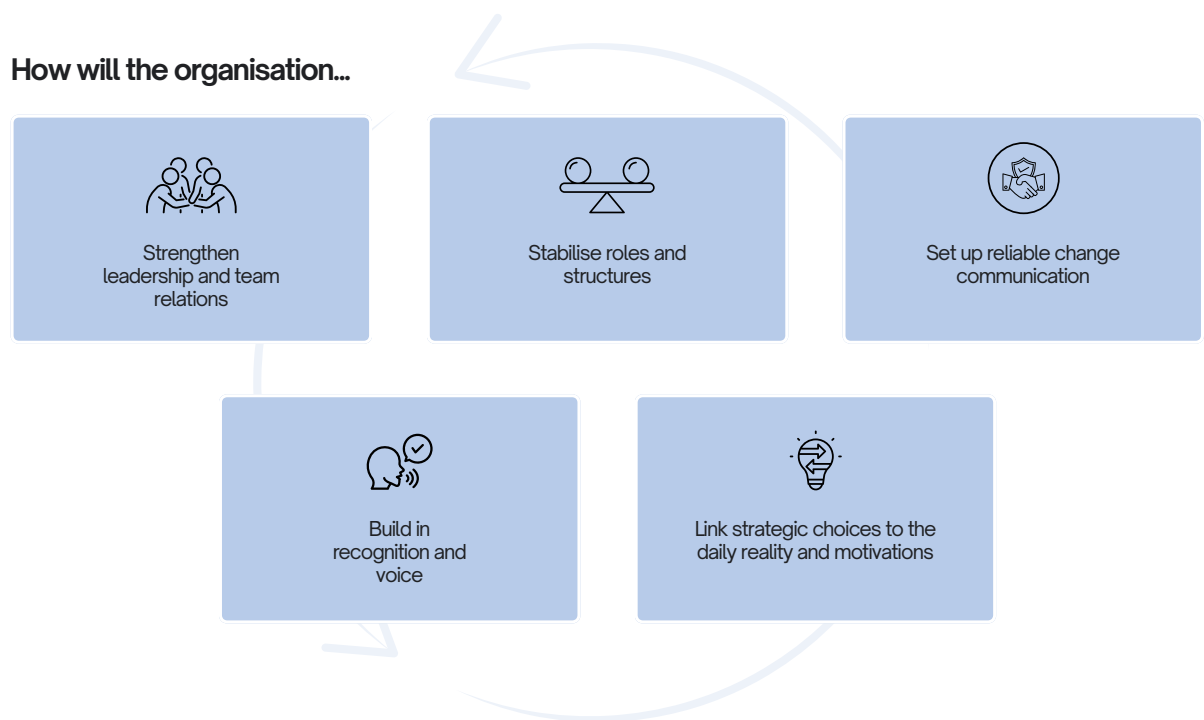


Figure 20: Strategic design implications.

12.2. Future Vision: ‘Building a Change-Ready Organisation’

In the desired future, leaders are regularly present on the work floor and feel close and approachable instead of distant. Employees experience their managers as honest, interested, and supportive, and know where to go with questions or concerns about the change. Communication is timely, clear, and two-way, people understand what a decision means for their own role, work expectations and team, and see that their input, feedback, or concerns can influence choices.

Socially, the us vs. them feeling between the original entities, the company and the group, or even departments, levels, or individuals has been limited and has provided space for a shared story and more ‘mixed’ teams. Legacy knowledge and different ways of working are not pushed aside, but openly discussed and consciously combined, so people feel their legacy and expertise still matter. Culturally and operationally, systems, targets and procedures are tested together with the people who it may concern or are using them in their daily tasks, so the systems support the work instead of making it heavier.

Informal bootlegging practices still exist, but they are no longer hidden or purely defensive. They are treated as signals that something in the formal system does not yet fit, or may not work as was expected at first, as well as being a potential source of improvement. These signals are discussed in a safe way, tried out in small pilots and, where considered to be useful, turned into formal practices. Since learning, recognition, and voice are the foundation of everyday leadership behaviour, the organisation is able to stabilise the current situation and is better prepared to handle future M&A’s or other (major) changes without repeating the same organisational, social, human, or cultural patterns.

12.3. Argumentation on Starting Point

Interviews repeatedly described a leadership layer (especially from the overarching group) that was experienced as distant and 'exclusive', both physically (rarely present on the work floor) and cognitively (perceived as disconnected from operational realities). This perception was shared across the different entities and hierarchical levels, indicating that leadership distance is not a one-time observation but a broadly acknowledged pattern. Where employees often referred to leadership as being an 'exclusive group', there is an emphasis on the gap between those who design the strategy and those who must live the consequences within the daily operations.

In this research leadership distance is defined as 'the physical and/or cognitive distance between the higher hierarchical levels and the lower hierarchical level'.

The consequences of this distance were visible in several areas. When leaders were not present or looked away from implementation struggles, corporate messaging lost credibility and was perceived as overly optimistic or compared to the experienced operational regression and workload intensification. This fuelled an information vacuum in which employees started relying more on informal gossip networks to understand what was happening, and it reinforced feelings of being an afterthought within the M&A and change implementations. At the same time, the lack of perceived top-down interest in operational complexities stimulated the employee's psychological withdrawal and a decline in professional interest, trust, motivation, and pride, which in turn increased fragmentation and bootlegging as ways to regain control.

During the co-creation sessions, employees and managers again highlighted that they are more willing to support change when their superior and team feel close, honest, and supportive. They also emphasised the need for clear information about what changes might mean for their own work and workload, as well as for low-threshold moments to ask questions and share concerns.

The root cause analysis showed that leadership distance functions as a critical point in the current 4-gap model feedback loop. If this critical point remains unaddressed, the credibility gap, the synergy gap, and the execution gap, are likely to persist if not become worse, as managers neither see the real constraints and challenges nor receive honest feedback about them. Leadership distance is therefore not just one problem among many, it is a core condition that enables the other friction points to reinforce each other.

For this reason, reducing leadership distance is considered the key starting point of the strategic plan. If leaders are not perceived as present and approachable, proposed interventions risk being perceived and interpreted as superficial projects rather than genuine attempts to improve the situation. In contrast, when leadership is perceived as more connected and visible, engages in honest dialogue, and actively acknowledges the formal as well as the informal workflows, it creates the relational and informational conditions that are required for employees to speak up and participate in feedback, brainstorming and co-creation. This shift aligns with literature on interactional justice and psychological safety (Bansal, 2019), which shows that respectful, accessible leaders are a foundational factor for learning oriented behaviour and sustainable change, as well as with the co-creation input, where people explicitly asked for approachable leadership, space for questions and clear expectations about choices.

To conclude, tackling leadership distance is the strategically chosen starting point for turning a M&A, that is currently surviving through informal practices into an organisation that learns openly from its own practices, people, networks, and culture.

12.4. Horizon 1: See & Be Seen

The first horizon focuses on the values such as visibility, honesty, and respect. These values are essential as the data showed that employees experienced leadership as distant and sometimes indifferent, which minimised, if not removes, trust and credibility. Visibility expresses the willingness of leaders to share the same physical as well as mental space as employees to witness their daily struggles. Honesty addresses the perceived mismatch between positive corporate messaging and the difficult operational reality. Respect refers to recognising employees as professionals rather than resources, which is a precondition for interactional justice and acceptance of change.

The co-creation outcomes confirmed the importance of this horizon as participants described that they feel more heard and taken seriously when managers are approachable, take time for conversations and explain what a change means for their work and corresponding expectations.

The goal of this first horizon is to reduce the leadership distance and make the informal, bootlegging-based reality safely visible. This is strongly based on the themes and insights of perceived absence of leadership, the credibility gap, and the visibility gap between formal strategy and operational reality. This horizon focused on the visibility and credibility gap by reconnecting leaders with the daily work reality and making the informal practices discussable. Tackling this gap first is essential, since without basic trust in leadership presence and communication, employees are unlikely to share honest insights or engage in later co-creation or brainstorming efforts.

12.4.1. Horizon 1 interventions

As a horizon will not be achieved without a plan, different interventions were considered as inspiration for taking the first steps in achieving the subgoal of this horizon. This reasoning will be the same for the other horizons, even though understandably, these will require different interventions.

12.4.1.1. Operational connectivity days

In this intervention, (senior) managers from all hierarchical levels (organisation and overarching group) will commit to recurring, planned operational connectivity or moments in which they are physically present on the work floor. Rather than performing inspections and strategic questions, they will place themselves as open-minded, observe critical processes and engage in informal conversations. The aim is for leadership to experience and be open to the practical disorientation, system rigidity, and workload intensification as was described by employees, deriving from the fact that these experiences are a serious topic for discussion. Research on interactional justice and leadership behaviour indicate that such visible, respectful presence strengthens perceptions of fairness, trust, as well as feeling heard and understood, which in turn consequently supports operational openness to change.

12.4.1.2. From mass messaging to dialogic communication

Current communication is by many employees perceived as one-way, optimistic, and disconnected from operational struggles, thereby fuelling scepticism and a gossip economy. This intervention aims to replace mass distributed messages with smaller, dialogic ones. Examples include team-level Q&A sessions, human focused town halls, and 'ask me anything' moments for example after announcement, if not every day. In these sessions employees can raise questions, express concerns, provide feedback, gain answers, and be present in a conversation. Important to note is the importance for leaders to be open for feedback and the conversation, make sure to take a minute before responding and not only focus on the strategic gains, but also what the value and possible stakeholder concerns and impact would be. The purpose is to move from communication that informs to communication that relates, allowing employees to connect the strategic narrative to their own work reality.

12.4.1.3. Workflow mapping and a psychological safety baseline

The data showed a system of different realities: formal processes on paper or which are perceived as the norm, and informal, bootlegging-based workflows that occur in practice. In this intervention, teams participate in short workshops to map how work is actually being done, including all unofficial tools, shortcuts and 'rule bending' that help maintain quality and meet personal as well as group targets. This workflow will be documented without blame, but rather as inspiration and professional knowledge, a true valuable resource. In parallel, a brief survey establishes a expected baseline of psychological safety, perceived fairness, and trust, which is based on data insights as well as the insights of Edmondson (1999) which shows that safety to speak up is a strong condition for team learning. Together, these steps will make informal practices and emotional states visible in a structured way.

12.4.2. Outcomes of horizon 1

By the end of Horizon 1, leadership will be more visible and approachable, and employees experience that their reality is being acknowledged rather than neglected, undermined, or even ignored. The organisation has a first structured overview of the (in)formal workflow and the emotional context connected to it. Bootlegging starts to move from a taboo topic to a discussible and interesting phenomenon, acknowledging one's professionalism and work, and creating the foundation for later collaboration and formalisation. Trust in communication is likely to increase, reducing reliance on rumours as primary source of information. Also, employees should be able to recognise an increased amount of moments where they receive clear, timely information about the (potential) impact of changes.

12.5. Horizon 2: Connect & Co-Create

..After successful 'finalisation' of the first horizon, a start can be made with the elements of the second horizon. It however remains important to continue the first horizon thoughts and interventions, as these remain as base for further succession and iteration.

Horizon 2 is driven by the values of connection, collaboration, and recognition. Connection is needed to minimise the social fragmentation and silo mentality that emerged when employees stepped back to their familiar ingroups for safety and security. Collaboration presents the need and intention to design solutions with, rather than for, the workforce, acknowledging that informal networks often hold the practical knowledge required to solve operational issues. Recognition is focused on acknowledging legacy, expertise, and professional identity, which as the insights highlighted, was previously threatened or neglected.

In the co-creation sessions, employees from the different hierarchical layers emphasised that they desired to be involved in thinking about solutions, see what happens with their ideas and be invited back into conversations, which directly connects with the values of this horizon.

The intention of the second horizon is to transform social fragmentation and silo-based, defensive bootlegging into collaboration and shared ownership of solutions and improvements. This horizon primarily tackles the identified synergy gap, brain-drain risk and the us vs. them reality described within the social and human lenses. It focuses on closing the earlier mentioned synergy gap, by bringing silos, legacies, and informal networks into collaborative problem solving. It is important to tackle this gap next, as only when people start working across boundaries, can the organisation turn survival strategies into shared, formal and strategic practices.

12.5.1. Horizon 2 interventions

As was explained for the first horizon, the second horizon consists of different interventions that would create good directions for the succession of this next phase.

12.5.1.1. Cross-disciplinary integration groups

This first intervention will create temporary, cross-disciplinary 'work' groups that bring together employees from the different entities, multiple departments, and different hierarchical levels to work on defined (integration) challenges, for example, aligning structural workflows, cultural differences, and resolving system handover issues.

These groups are given a voice, platform, and time to discuss and gain a solution within its boundaries. The Social Identity Theory indicates that such cooperative group collaboration concerning shared goals could create new ingroups and reduces 'them' perceptions. Practically, this intervention will connect informal trust networks to formal structures and prevents integration work from being pushed solely onto individuals or top levels.

12.5.1.2. Knowledge (and legacy) harvest sessions to honour expertise

The findings showed that many employees experienced their legacy and achievements are being undervalued or neglected, leading to identity erosion and knowledge hoarding. In knowledge harvest sessions, mixed groups of stakeholders will identify which (legacy) methods, tools, and rituals contribute to quality, speed, safety, or employee or customer satisfaction. Instead of assuming that one side's practices should be the norm, the sessions decide which elements are preserved, adapted or consciously deleted, with clear reasoning, argumentation and support. This will provide functional recognition of expertise and demonstrates that knowledge and legacy is a resource rather than something that people should keep to themselves or is a problem.

12.5.1.3. Pilots to capture and test valuable workarounds

Informal workarounds and bootlegging practices are already expected to surface partly in horizon 1. These practices are often pragmatic responses to resource gaps or system rigidity. In this intervention, a selection of these practices should be transformed into organized pilots. For each pilot, the team defines the problem, tests the informal approach in a controlled way, evaluates its impact, and decides whether to standardise, adapt, or discontinue it. This approach connects bootlegging to established continuous-improvement methods and prevents valuable innovativeness from remaining invisible or risky.

12.5.1.4. Knowledge transfer and mentoring to prevent brain drain

The research identified the risk of brain drain, where experienced employees withdrew or withheld knowledge as a form of self-protection. To minimise this, the organisation should introduce structured mentoring, pairing arrangements, and short documentation sessions for (critical) knowledge (domains). These are supported by recognition, for example through mentioning mentoring contributions in performance conversations. Literature on knowledge management already highlighted that such social mechanisms and incentives are necessary for effective knowledge sharing to move beyond the first expected technical or repository elements.

12.5.2. Outcomes of Horizon 2

At the end of second horizon, cross-disciplinary collaboration should be increasingly normalised, and the informal trust networks that previously operated in parallel should become connected to formal integration structures. Employees experience that their legacy and expertise are recognised, resulting in a reduce in defensive silence and silo mentality. The pilots would result in employee-driven solutions that could shape formal processes, minimising negative stakeholder impacts and reframing bootlegging from resistance into a shared solution space. The synergy gap will start to close as knowledge flows more freely across its boundaries and as employees see more concrete examples where their input was used and send back to them.

12.6. Horizon 3: Embed & Evolve

After finalising, iterating on and stepping forward in the process of horizon 1 and 2, a next step can be made towards the third and final horizon before achieving the desired future vision. Horizon 3 is closely connected to the values of learning, fairness, and sustainability. Learning presents the ambition to transform an organisation into a continuous learning system, where informal practices and feedback are integrated into the decision-making. Fairness addresses the need to stimulate interactional and procedural justice, so that employees experience changes as something done with them rather than to them. Finally, sustainability focuses on the intention to move beyond fast fixes towards a structural capability to handle future M&A or change implementations with less human, social, and cultural collateral damage.

The goal of this third horizon is to embed the created framework, learning routines, and human-centred practices into organisational procedures, and general managing of the company, thereby turning the current integration and change implementation experiences into a lasting organisational capability.

This horizon focuses on the remaining execution gap by making realistic human focused design a standard requirement for future changes, directly affecting the visibility gap. It also promotes the stabilisation of the credibility gap by ensuring that formal decisions are visibly informed by bottom-up perspectives and insights. Placing this horizon as last is crucial, as only after visibility and collaboration have been rebuilt in horizon 1 and 2 can these behaviours be structurally based in systems and organisational or group policies.

12.6.1. Horizon 3 interventions

As was explained for the first and second horizon, the third horizon consists of different intervention opportunities that would create opportunities to support the succession of this horizon and most importantly, towards the desired future vision.

12.6.1.1. Embedding the framework into managerial decision-making

The revised conceptual framework consists of 14 organisational, social, human, and cultural factors such as leadership visibility, operational practicality, informal social systems, professional identity and system compatibility. In this intervention, the created framework should be adopted as a standard diagnostic tool for decision making, especially for large decisions. Before proposing and integrating new changes, managerial layers should assess each factor, identify potential risks or shortcomings and their impact(s) in order to define mitigating actions. This will ensure that future plans explicitly consider and acknowledges the dimensions that were previously overlooked and that contributed to aspects like defensive bootlegging and fragmentation.

12.6.1.2. Iterative ‘learning from informal practices’ cycles

To prevent a return of organisational blindness, an iterative and open group or forum is introduced including representatives from different hierarchical layers. These cycles could be department focused or general, however important to note is that it remains important to make sure the employees that are representatives in this group are part of the informal trust systems, rather than top-down preferences. This group of people would communicate and discuss how different topics, challenges, or issues on the framework dimensions are proceeding, evaluating its progress, its struggles, making sure that blindness is prevented. The result of these discussions? An approach on the topic at hand according to multiple-layer perspectives, recognising which elements should be stopped, redesigned, or formalised and assigning responsibilities to the employees one believes to be able to well tackle or communicate these challenges. This intervention will make sure the organisation will keep learning from informal behaviour, aligning with research that acknowledges informal organisational learning as a key response to (disruptive) change. Additionally, this intervention will make sure a larger group of employees will feel heard and represented due to its informal trust networks and departmental association.

12.6.1.3. Aligning leadership behaviour with desired behaviours

At this moment, employees, as well as leaders, are mainly evaluated on hard indicators such as financial results and technical performance. If evaluation and promotion remain mainly focused on financial, operational, and technical KPIs, behaviours like being visible on the work floor, truly listening to employees, or building cross-team collaboration will always feel nice to have instead of being essential. This intervention therefore makes human-centred behaviour part of the formal criteria for being a good leader or manager in the company. Leadership profiles are updated so that expectations explicitly include being regularly present and approachable on the work floor (physical and mental), inviting and using feedback even when it is critical, actively connecting different teams and individuals and entities, and creating an overall work environment in which people feel heard and safe to speak up. These expectations are then reflected in performance reviews and decisions, for example by asking employees for feedback on these aspects and by discussing concrete examples of such behaviour in evaluation sessions. An additional advice here could be to make sure employees will be granted a second opinion conversation (instead of evaluation conversations that are only with their direct managers) when issues are arising with their first manager. This could for example be a trusted peer with the authority to speak up and the ability to translate the issues into pragmatic feedback.

By doing so, the organisation signals that how leaders achieve results is just as important as what they achieve. Over time, this will help the stabilisation of the desired learning culture: leaders who are open, visible, and collaborative are recognised and growing, while purely distant, transactional styles are no longer the normalised way of managing. In the end, these leaders that are experienced as present, will gain employee trust, respect and will hear the stories of reality.

12.6.1.4. Testing co-designed systems and solutions on pragmatic fit

Prior integration and change implementation introduced new ways of working, rules, and expectations that did not always sufficiently match operational realities, leading to regression, overload, and an increased need for workarounds. In horizon 3, any new system or structural change is co-designed with representatives from affected teams and is pilot tested for impact on workload, usability, and safety before large scale implementation. Acceptance criteria explicitly mentioned the need for a pragmatic fit with daily work and effects on psychological safety. This intervention directly targets the operational and execution gaps and reduces the likelihood that survival bootlegging practices to be necessary in the future.

12.6.2. Outcomes of Horizon 3

By the end of horizon 3, the organisation will be able to handle change in an organised and predictable manner due to the constant evaluation of the framework dimensions and hierarchical inputs. Roles, routines and systems are better aligned, which means fewer unexpected issues reach the work floor and employees experience less reactive and more proactive problem-solving during integrations or other (major) changes. Instead of responding ad hoc to problems, there is a regular time of reflecting on what goes well, where people still rely on (in)formal practices, and what these reveal about the work reality.

Informal bootlegging practices are no longer the main way to keep operations running but become signals that help to finetune the formal processes and struggles. When such signals appear, they are picked up in a structured way, discussed with the people involved and translated into clear follow-up actions (not consequences!). This way of working reduces the risk that organisational, social, human or cultural tensions slowly build up unnoticed. It also increases the likelihood that future M&A's or change initiatives can be implemented without returning to the same patterns of confusion, survival bootlegging or fragmentation.

Horizon 1

Restoring basic trust and clarity by making leadership visible, accessible, and connected to the daily work realities.



See & Be Seen

0-10 months

Horizon 2

Rebuilding connection and shared ownership by turning fragmented, defensive practices into open collaboration and joint problem-solving



Connect & Co-create

10-20 months

Horizon 3

Embedding learning, fairness, and human-centred practices into the formal system to create long-term stabilisation for change through organisational learning and adaptation capabilities.



Embed & Evolve

20-30 months

Future Vision

An organisation that **grows** together with its people, with every voice helping to build a more **fair, human, and change-ready** organisation.

13. Tactical Roadmap

Where the previous chapter explained more on the academic reasoning behind the strategic plan, this section will provide more in-depth information on the strategic, detailed steps taken. The tactical roadmap (see Figure 22) translated the three strategic horizons into concrete, time-bound steps for building a change-ready organisation, the ultimate and need and goal according to this research.

It shows how trends and developments, values, stakeholders, resources, and feedback loop gaps are connected across time. The vertical axis is organised in four layers: direction & context, people & roles, ways of working, and outcomes & risks.

13.1. Direction & Context

At the top of the tactical roadmap, each horizon starts with key trends and developments that describe the desired situation. In horizon 1, developments such as visible leadership, clearer information and first relief of overload show the move away from leadership distance and the information vacuum. Horizon 2 continues with developments such as collaboration, open trust networks, and informal practices being interpreted as signals for improvement. Horizon 3 adds developments such as normalised and implemented learning routines, embedded informal solutions and a 'safer' working environment, indicating that change becomes a stable capability rather than a crisis response.

Beneath these lines, related values summarise what is being built in each phase, by each trend and development. Horizon 1 primarily builds trust, clarity, recognition and workability. Horizon 2 adds connection, minimalization of brain drain, inclusion, and shared ownership and Horizon 3 combines these into earlier identified growth potentials, sustainable improvement, a comfortable working environment, and a stability for change.

13.2. People & Roles

The stakeholders layer provides more in-depth details on who is responsible in each horizon, and most importantly what is expected of them in simple terms. In Horizon 1, the overarching group provides room and the right resources for visibility and honest (local) communication, the leadership team leads by showing up, the management team acts as the bridge, and operational staff are the core source of truth. In Horizon 2, collaboration, joint brainstorming and problem-solving becomes central. The overarching group enables and provides support to scale successful ways of working, leadership acts as a bridge, management organises and protects multi-disciplinary collaboration, and the operational staff co-designs solutions. For Horizon 3, there is an emphasis on managing. The overarching group is advised to use and implement the created framework (see Table 4) into their standards and decision-making, the leadership uses the framework for (major) decisions, management applies it in projects and learning routines, and the operational staff delivers continuous feedback, which can be used as input on the actual performance within the framework dimensions.

13.3. Ways of Working

The three value propositions summarise what each horizon is supposed to deliver. Horizon 1 focuses on visible, honest leadership for people to feel seen and informed. Horizon 2 considers people working side by side, turning experiences and (in)formal practices into shared solutions. Horizon 3 describes an organisation that designs future changes with its people using shared rules, routines, and retrospective loops.

Below these propositions, resources and channels specify how these promises are made into concrete manners. Resources include time, capabilities, and artefacts. Channels describe where interactions happen. Together, these elements highlight that the roadmap is not only about intent but also about practical enablers, motivators and stimulators.

13.4. Outcomes & Risks

The bottom layer of the tactical roadmap links the strategy steps to the four gaps identified within the 4-gap model. Horizon 1 mainly tackles the visibility and credibility gaps by reducing leadership distance, addressing the information vacuum and minimising the most acute operational chaos. The result, being an improve in trust and basic workability. Horizon 2 focuses on synergy and credibility gaps by breaking the us vs. them dynamics, opening silos, and converting bootlegging practices into the foundation for improvement, resulting in collaboration and perceived fairness in using expertise. Horizon 3 focuses on all four gaps in a structural way by improving and consistent learning routines, integrating solutions and building further on psychological safety. The result of the third and final horizon is that future changes can be handled with more stability, there is to be less hidden survival and a stronger human, social and cultural foundation.

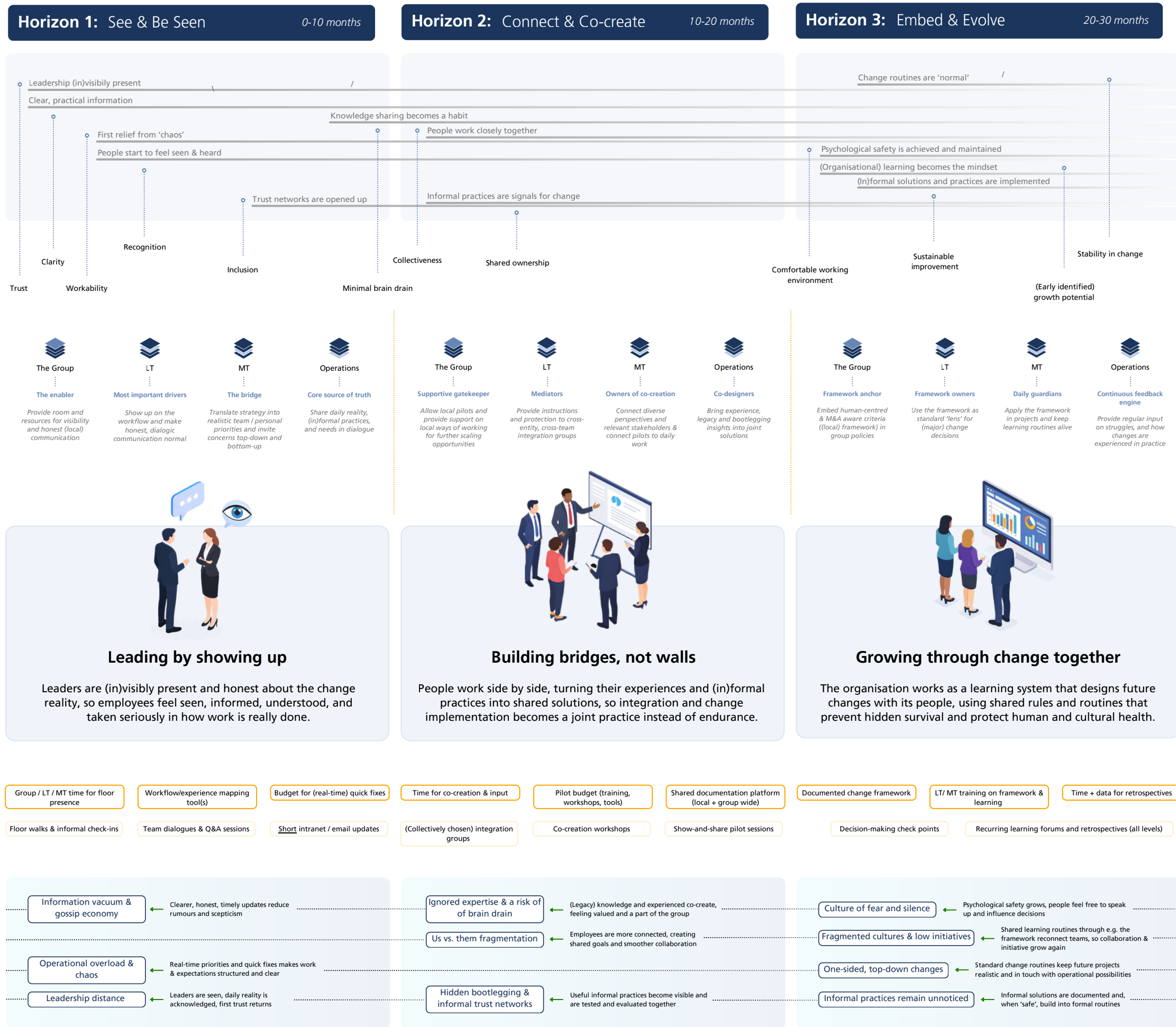
Altogether, the tactical roadmap shows that an organisation (such as the case company) moves from short-term survival towards a change-ready organisation that grows together with its people and treats each challenge and (potential) change as an opportunity for shared learning and improvement rather than a threat or one-way implementation.

Tactical Roadmap →

Figure 22: Tactical roadmap.

Building a Change-Ready Organisation

DIRECTION & CONTEXT
PEOPLE & ROLES
WAYS OF WORKING
OUTCOMES & RISKS



An organisation that **grows** together with its people, with every voice helping to build a **fair, human, and change-ready** organisation

14. Stakeholder Validation

In this chapter it is explained how the proposed framework and strategic roadmap are experienced and perceived by key stakeholders for validation and refinement. The goal of this chapter is to understand to what extent the strategic proposal aligns or is considered to be realistic with their expectations. The chapter presents the aim of this session, the set-up and the guiding questions that were used to gain insights, followed by the main gathered input and the resulting argumentation iteration on the strategic plan.

14.1. Aim and Participants

Where a strategic plan has been created, the practical relevance and feasibility of this proposed strategic and tactical roadmap is of key importance to be validated through a stakeholder validation session. This session was organized with members of the case company's leadership team (LT). All LT members participated, all of whom hold responsibility for PIMl integration and change efforts and the overall strategic direction of the new M&A organisation. The primary aim of this session was to present the research, the outcomes, to gain insights and perspectives of those who would be some of the core enablers for this proposed plan.

More specifically, the session aimed to validate (1) the reasonableness and acceptability of the problem framing which is expressed through the proposed framework and reinforcing feedback loops, (2) the perceived realism of the roadmaps in terms of pacing and scope, and (3) the implications of the proposed bootlegging mindset for future change implementations. In this way, the validation formed an empirical step in translating the research from an analytical contribution into a practically validated strategic design proposal.

14.2. Session Set-up and Procedure

The validation was set up as a 60 minute, in person meeting. The session started with a presentation of the research process, summarizing the qualitative case study, the revised framework, the 4-gap model, and the translation of these insights into the strategic and tactical roadmap. This presentation served to create a shared base from which the LT members could position their feedback, reflections, and perspectives, as well as to make explicit how the roadmap was grounded in both empirical as well as real-time findings.

As follow-up on this, after the presentation, the session shifted towards an interactive discussion, guided by a series of questions. These questions invited the LT members to provide insights on the recognizability of the root causes, the perceived realism of the proposed time frame, the strategic plan, the current activities that are being taken to capture insights from the different operational layers, their interpretation of the bootlegging mindset, and other points of feedback that may be relevant to the strategy. The conversation was conducted in an open, exploratory manner with room for participants to bring in concrete examples from their own practice.

During the session, all comments and questions were captured in notes. After the meeting, these notes were connected to the guiding questions. This provided a focused interpretation of the LT input in relation to the thesis outcomes.

14.3. Guiding Questions

To structure the dialogue and to make sure the different validation aspects were more explicit, the guiding questions shown in Table 6 (see next page) were used during the session:

Table 6: Stakeholder validation prompts.

Question theme	Guiding question
<i>Identified challenge and gaps</i>	<ul style="list-style-type: none"> • To what extent do the flow charts (spirals) reflect your perception of the current organizational dynamics? • Are the four identified gaps (credibility, synergy, operational/execution, visibility) recognizable and relevant, or do you see important elements that are missing or overemphasized?
<i>Time frame and pacing of the roadmaps</i>	<ul style="list-style-type: none"> • What would you consider to be the realistic overall time frame for this strategic plan? • Does the proposed pacing align with your expectations, or would you shorten or extend phases to be more appropriate given other ongoing developments?
<i>Current activities for accessing operational reality</i>	<ul style="list-style-type: none"> • Which activities are currently in place to gain insights from the different departmental layers and to connect with employees' lived experiences (e.g. sessions, surveys, programs)? • How do these activities contribute to understanding the operational reality?
<i>Implementation and departmental 'translation'</i>	<ul style="list-style-type: none"> • How could the framework and roadmap be implemented in a way that created shared understanding at the different departmental layers? • What would leaders at different levels need in order to translate the plan into everyday communication and decision-making?
<i>The bootlegging mindset</i>	<ul style="list-style-type: none"> • How do you interpret the idea that informal (bootlegging) practices can be seen as a rational response rather than intended resistance to the change implementations? • What would it mean for your own leadership practice if informal workarounds and signals were treated as input for learning rather than be recognised as resistance?

These different questions show that the session was not intended to gain simple approval, but rather to consider potential confirmations, doubts, challenges, and conditions that would influence the viability of the strategic plan.

14.4. Leadership Team Input

The LT input has been summarized into groups of comments that represent the several key themes connected to the guiding questions. See Table 7 for these themes and comments.

Table 7.: LT input categorised by validation theme.

Validation Theme	Description
<i>Perception of research and the spirals</i>	LT members described the presented data and concluded spirals as confronting but to some degree recognizable, referring to them as a 'harsh reality' that illustrated the causal relationships where what they thought to be initially small decisions, were presented with their larger consequences. They indicated that the visualization helped them to see how these 'minor' issues, of which the importance may have been underestimated, could result into structural challenges, and suggested that opening up and recognizing these findings more in the organization could support further dialogue and hopefully step away from this negative spiral.
<i>Time frame and pacing</i>	The three horizon structure of the roadmap was considered realistic, yet LT members questioned the precise time frame per phase. They discussed which time frame would be feasible when comparing to other strategic programs and parallel change initiatives together with this need for changing the current operational spiral. LT members suggested that the time frame should be explicitly related to the intended goal of each phase, making the current chosen time frame a good first indication, however, as was assumed there will remain a need for flexibility in pacing.
<i>Familiarity with (integration) gaps</i>	The credibility gap was recognized as already known within the LT. The other gaps were experienced as less explicit, although the underlying reasoning and importance was considered insightful. In particular, the execution gap was described as relatively 'less known', indicating that the theoretical insights and roadmap adds a useful perspective on how operational reality may vary from the initiated strategic intentions.
<i>Current activities for accessing operational reality</i>	Regarding the question focused on the bottom-up retrieval of insights, LT members mentioned different ongoing activities that aim to connect with the operational reality. Examples included the (1) '12 uurtjes' sessions, in which a LT member engages with a small group of employees from different departments and operational levels, (2) recurring monthly STRAT meetings, where action points are discussed and associated workgroups are chosen, (3) 'teampeak' program for leadership development, and (4) the engagement survey from which action points were found, providing employees the opportunity to contribute and help solve these challenges. These activities have already been created by the company and therefore could be considered as extra touchpoints that could be aligned with the identified gaps and horizons if the output of these activities help to provide the change readiness of the company.
<i>Implementation and leadership role</i>	Different LT members raised questions about how the strategic plan and framework could be implemented without taken a fully top-down approach. They emphasized the importance of creating a shared and common understanding on the different hierarchical levels, starting with the leadership team and managers. As managers would need to explain and translate the plan in their own words to their teams. LT members mentioned top-down implementation may be needed according to the structural changes of the spiraling situation, however this would contradict with the bottom-up perspective of the insights. Therefore, a flexibility might depend on the topic at hand.
<i>Bootlegging, resistance and parallel changes</i>	The conversation on the bootlegging mindset, particularly the perspective that informal actions within the current situation were or are often a rational response rather than active resistance, created somewhat of a divide. LT members noted that the multiple and frequent changes and shifting expectations triggered not only rational responses but also resistance, even when individual initiatives were well-intentioned. They agreed that a certain level of resistance is inevitable and that it may not be possible to 'do good' for everyone but considered it important to reflect on what can be done to be 'good for the largest group' when designing future interventions.

Table 7 shows that the leadership team did not treat the roadmap as a closed, linear plan, but were open to the topic and its goals. They engaged with it as a tool that could help existing practices and challenges, constraints and assumptions about change, aligning with the aim of such a strategic plan.

14.5. Conclusions

The stakeholder validation session mainly supported the presented results of this research. The strategic and tactical roadmap were considered as fitting for the current organizational reality and is recognized by the leadership team as relevant. The LT members noted that the 4-gap model, and the proposed framework describe the situation in a way that feels confronting, but realistic. The root cause analyses as well as the roadmaps helped the LT members to see how choices could unintentionally stimulate informal survival responses.

At the same time, their feedback highlighted that the strategic plan could only be used effectively if certain conditions are taken into account. The discussion on time frame and pacing presents that the horizons should not be treated as a fixed schedule, but rather as a flexible structure that must be aligned with other change initiatives and capacity, while still maintaining and acknowledging its priority and importance. In the end, time pacing may vary as implementation of this strategic plan becomes an 'extra' element to consider in everyday work. Also, the plan suggests a serious behaviour change and change in organizational routine, making it a relatively dynamic process. Next, the input provided on existing activities such as the '12 uurtjes', 'the teampeak program', point out that there are already some efforts being taken through different channels to access the operational reality. The strategic should therefore recognize the effectiveness and output of these activities and consider them rather than ignoring them or simply creating additional structures.

The input on implementation emphasize the role of leadership as an enabler. LT members highlighted that in their perspectives the strategic plan would only work if department leaders understand its value and goal and are able to translate it into their own words for their teams. Important to add here is that besides translating the value and goal of these plans, there is also the important element for departmental leaders (MT) to acknowledge the value of all hierarchical layers rather than only communicating top-down. A purely top-down roll-out would contradict with the bottom-up insights that form the base of this research. Therefore, the strategic plan and its initiatives should be used as a shared tool, not as a set of instructions that are pushed down the operational hierarchy.

The discussion on bootlegging and resistance presented some confirmation as well as new perspectives on this topic. LT members recognized that not all responses to change should be interpreted as constructive, some employees are experienced as primarily resistant, concluding that it will not be possible to 'do good' for everyone. At the same time, they recognize that there are many situations in which people develop informal practices as they desire to keep the organisation running as well as possible under imperfect conditions. In those cases, informal practices are closer to bootlegging as defined in this research: informal actions that are taken with the perceived best interest of the company in mind, even when they fall outside the formal plan. For future change efforts, this means the organisation should more carefully consider which initiatives are actual resistance and which can be seen as informal survival practices that are aimed to help the organisation move forward. In the end, these could be used as learning input for improving formal plans, instead of treating all informal initiatives as unwanted behaviour.

Overall, the stakeholder validation suggests that the strategic plan is seen as an useful and recognizable tool, but also as a well-considered starting point that still requires active translation, alignment and ownership. It strengthens the conclusion of this research that building a change-ready organisation will depend on how well formal plans, leadership behaviour and bottom-up experiences are brought together in ongoing dialogue, initiatives, and efforts.

14.6. Strategic ‘Iteration’ Implications

The stakeholder validation session did not result in the requirement for fundamental redesigns or iterations on the proposed strategic and tactical roadmaps. It did point out to certain refinements on argumentation that would strengthen its practical applicability. First, the discussion on pacing indicated that the suggested duration of approximately 10 months per horizon could potentially be shortened depending on the improvements within the expected time frame per horizon. Where it was suggested to maybe shorten the expected time frame, as this process is considered to be a behaviour change, it would take more time than might be expected at first. Therefore, it remains important for the plan to be treated as a guide, which time frame may change over time as long as there remains an acknowledging of the priority and need for this plan.

Secondly, the LT input highlighted that several initiatives were taken to support and gain bottom-up insights and leadership visibility. As a result, during the implementation of the strategic plan it remains important for the leadership team as well as the group to consider these initiatives, their goal, and their actual considered and experienced output in order to determine whether these initiatives could be seen as supports for the strategic plan or as parallel initiatives focusing on another goal.

Third, the stakeholder validation highlighted the importance of leadership qualities in translating the strategic intents into everyday practice. The strategic plan should include the need for and task of equipping the different hierarchical layers with a ‘translated’ version to make sure a general understanding will be created and can be used as a conversation tool or tool for improvement tracking.

Together, these small improvements on argumentation and consideration ensure for the strategic plan to better reflect the stakeholders’ feedback and to be closer aligned with the organization’s existing structures, capacities, and leadership responsibilities as well as the operational complexities and reality.

15.Discussion

This chapter discusses how the research findings help to better understand bootlegging during post-merger integration (PMI) and what this means for managing change within the case company. The results are related to the theoretical background and the organizational reality described in earlier chapters, finishing with a reflection on implications and boundaries of the study.

Overall, the research shows that formal change efforts and informal bootlegging practices together shaped the integration and change implementations. Formal plans set a direction, while informal practices kept daily operations going. However, at the same time gaps between these two parallel practices appeared. The following sections will reflect on what this means for the concept of bootlegging, for current (mis)perceptions on resistance, for the relation between formal integration strategies and lived realities, and for a more human-centered approach to PMI.

15.1. Rethinking Bootlegging in PMI

Existing research often describes bootlegging as creative deviance or bottom-up innovation leading to ideas or products which is done with the best intentions of the organisation in mind (Criscuolo et al., 2013; Globocnik et al., 2022; Mainemalis, 2010). In this research, bootlegging was presented in a different way. During the merger, people used informal routes, known practices, and informal social networks to continue daily operations when formal systems felt too rigid or did not fully comply with the lived reality, as was presented in the data results and the operational chain reactions (see Figure 17) presented in Chapter 6 and Chapter 7.

This shows that bootlegging does not always look the same. In some contexts, it can be proactive and innovative, in others, like this research, it is more a defensive and rational way to cope with uncertainty, unclear work expectations, rigid procedures, and perceived higher workloads. Instead of seeing all informal practices as problematic, it becomes more useful to wonder what they are trying to fix or protect. In this way, this research broadens the understanding of bootlegging from being a mainly innovation driven concept towards a mechanism that could guard operational survival during (large-scale) change implementations, especially when formal structures may not fully comply with daily needs.

15.2. Beyond resistance

Large pieces of known literature and models on change management present a clear divide between formal change initiatives and employee resistance (Armenakis & Harris, 1993; Piderit, 2000). The findings of this study suggest that this divide may be too simplified. A large part of informal behaviour that was observed cannot be described as resistance alone. Employees often moved away from the formal plan as they wanted to maintain quality, protect their personal identity or support colleagues and customers, as was illustrated by the interview data and the synthesis of M&A bootlegging in Chapter 6.

By using the concept of bootlegging, this research highlights that such informal behaviour could be a valuable source of information. It could present where formal plans remain unclear, are experienced as unrealistic or do not fully fit with existing values and expectations on fairness (Bansal, 2019). This does not mean that every informal practice is helpful, but it does suggest that managers, or in general decision makers should carefully consider which informal actions are meant to help the organisation and which one might truly block the integration and change implementation. In practice, this implies a shift from viewing informal practices mainly as resistance to treating them as signals about potential struggles or misalignments.

15.3. Formal Plans and Informal Practice

The results suggest that the merger developed on two parallel levels: a formal integration process designed by leadership and an informal operational workflow created by employees. On the formal level, the group and leadership team designed structures, targets, and timelines to create desired goals such as synergy, efficiency, and overall alignment, as was described in the case introduction in Chapter 2. On the informal level, employees built an informal workflow with their current routines, shortcuts, and agreements to make the work manageable, as was shown in the data results and the operational chain reaction spirals (see Figure 17).

The framework and the four identified gaps (credibility, synergy, operational / execution, visibility) help to understand how these two levels developed in parallel. When leaders do not acknowledge or fully 'see' the informal workarounds and challenges, a visibility gap appears. When messages are not fully matching experience, credibility drops. When knowledge and practices stay inside silos, synergy remains theoretical (De Waal et al., 2019; Jeske & Olsen, 2024). And when capacity, resources, and expectations are not fully aligned, people will depend on bootlegging to bridge these gaps.

The strategic and tactical roadmap presented in Chapter 12 and Chapter 13 present a response to this situation. Horizon 1 focuses on leadership visibility, honest dialogue and the stabilization of expectations, before moving onto the two follow-up horizons that focus on cross-silo collaboration, knowledge preservation, and learning through considering the different elements of the framework. In this way, the roadmaps could be read as an attempt to reconnect formal structures with the informal practices, instead of neglecting the informal level on which daily operations currently rely.

15.4. A human-centered view on PMI

A key aim of this research was to view PMI not only as a structural integration, but as a human process. The different perspectives (organizational, social, human, cultural) paired with the bottom-up bootlegging perspective as was used during the interviews, showed how people experience the merger as confusing, tiring, and sometimes identity-threatening, while they are still trying to keep it running (Ashforth & Mael, 1989; Hogg et al, 2023).

The framework (Table 4) and roadmaps take these human aspects seriously by defining the dimensions within the categories from a more practical, human-centered perspective rather than a top-down theoretical one. Defined elements in this framework such as leadership visibility, professional identity and psychological safety should be at the core of a proposed strategy. This matches earlier work that links successful change to clear leadership communication, readiness and perceived justice (Armenakis & Harris, 1993; Bansal, 2019) and to a climate where it feels safe to speak up (Edmondson, 1999; Newman et al., 2017). It highlights that trust, fairness and belonging are not elements that are “nice to have”, but are of significant importance. They are conditions that strongly influence whether people support the change, quietly compensate for it through bootlegging, or withdraw entirely. For organisations this means that human and cultural questions need to be treated as core strategic design topics in PMI change implementations, not as minor challenges, or communication afterthoughts.

15.5. Reflections on the Research and Design Approach

The chosen research design of a qualitative single case study, combined with co-creation sessions and strategic roadmapping, made it possible to gain in-depth insights and to capture informal practices that usually remain under the radar. The interviews, co-creation sessions and stakeholder validation described in Chapter 6 en 7, Chapter 11, and Chapter 14 helped to connect bottom-up experiences with top-down perspectives and to translate them into a new framework and strategic plan grounded in the case company’s reality, while offering insights that may be relevant to other PMI contexts.

At the same time, this design also contains its boundaries, which will be further detailed in the conclusion chapter. The results were derived from one organisation in one sector and are therefore context specific. The roadmaps are a proposal based on this context and still needs time to show how it will work out in practice. In the end, a strategic plan is a guideline, reality such as with a merger, may require altering over time. The close connection of the researcher to the case company provided rich insights, but also required strong awareness of possible bias. These points do not reduce the value of the findings, but rather highlight that the results should be used as a well-grounded base for further research and other or new PMI contexts and situations.

16. Conclusion

This chapter connects the different parts of the research to answer the main research question and to show what the research contributes to theory and practice. It briefly summarises the key findings, reflects on their implications, and outlines limitations and directions for future work.

16.1. Answer to the Research Question

As was formulated in the introduction chapter of this report, the goal of this research was to answer the research question, being: *'How do formal organizational change efforts interact with informal practices during post-merger integration, and what does this imply for integration goals and synergies?'*

The study shows that formal efforts and informal practices continuously co-create the integration and change implementation process. Formal integration strategies in the case company were organized around goals such as synergy, efficiency and alignment, supported by new structures, systems and communication routines. In daily work practices, however, employees experienced gaps between the top-down ambitions and the operational reality, shaped by unclear work expectations, limited resources, changing priorities, and most importantly: leadership distance.

In response, people developed an informal workflow of practices to keep operations running, protect professional standards and group identity, and support (trusted) colleagues. These informal practices fit the definition of bootlegging used in this research; unofficial actions taken with the perceived best interest of the organisation in mind, but outside of the formal plan. Bootlegging acted as a rational survival mechanism that helped to bridge gaps, maintain quality and meet demand during the PMI phase. At the same time, because these informal efforts remained largely invisible to higher hierarchical levels, they reinforced a series of integration gaps, which were presented as the operational spirals (see Figure 17 and Figure 18). Leaders and important decision makers tended to overestimate how well new structures were working, credibility was challenged when messages did not match experience, knowledge remained hidden and the operational gap between plans and practice widened.

The framework (see Table 4) and the four gap model (see Figure 17) - the credibility gap, synergy gap, execution gap, and visibility gap - help to describe this pattern. They show how a bottom-up perspective on organizational, social, human, and cultural conditions together influences whether bootlegging remains a defensive, hidden way of working or can turn into a more open shared way of learning. In summary, formal plans determine the direction, while bootlegging reveals and compensates for the gaps that appear. The success of integration and change implementation goals and synergies therefore depends on how well organizations recognize and work with this interaction, rather than treating formal and informal practices as separate and hierarchically different.

16.2. Theoretical Contribution

This research contributes to three main academic domains: bootlegging, change management, and mergers and acquisitions.

First, the study builds upon previously conducted bootlegging research by examining bootlegging within a post-merger integration context instead of the more common R&D or product innovation settings, where it is usually considered (Criscuolo et al., 2013; Globocnik et al., 2022; Mainemalis, 2010). The findings of this research show that, in this case, bootlegging mainly appeared as a defensive way to keep daily work going when organizational systems felt too rigid, workloads were perceived as higher, and uncertainty was strong. This suggests that bootlegging can range from proactive innovation to protective survival, depending on the performance on the framework elements (see Table 4), such as perceived resources, psychological safety and cultural support.

Second, the research findings add to change management literature by questioning an often made, clear division, between formal change initiatives and employee responses and experiences (Armenakis & Harris, 1993; Ford et al., 2008; Piderit, 2000). This study shows that a large part of what happens informally cannot be captured by the principle of 'resistance'. Employees often move away from the formal plan as they desire to keep professional standards high, protect their sense of identity, or maintain quality for customers. By describing these actions as bootlegging, this research highlights that the often perceived idea of so-called resistance, could rather be seen as a positive trait, making it a useful source of information from which challenges and potential misalignments or misfits could arise. This bootlegging perspective shows that some forms of informal behaviour are not meant to block the change itself but are taken with the best intentions of the organisation in mind.

Third, the research contributes to the mergers and acquisitions (M&A) literature by bringing in an informal bottom-up perspective on why M&As tend to succeed or struggle. Earlier studies point to different cultural clashes, weak sociocultural integration, lack of leadership vision and communication as important reasons for post-merger struggles (Cintrón, 2020; Nahavandi & Malekzadeh, 1988; Weber & Tarba, 2012). This research acknowledges these factors, but presents them from a bottom-up perspective into more concrete, everyday informal practices that are often invisible or overlooked in formal strategic plans. The framework (see Table 4) and the 4-gap model (see Figure 17) provide a more human-centered view on PMI, in which bootlegging helps to explain how formal structures are truly experienced and handled in daily reality.

Finally, by linking bootlegging to psychological safety and voice (Edmondson, 1999; Newman et al., 2017), this research suggests that informal initiatives are shaped not only by top-down implementation strategies, but also by how safe people feel to bring up problems and ideas through official channels. When psychological safety is perceived as low, informal practices are more likely to stay hidden, increasing the visibility gap and limiting the organization's opportunities to learn.

16.3. Practical Implications

The findings of this research provide several practical implications for organizations when managing post-merger integration and change implementation.

First, leadership teams would benefit from treating bootlegging as a diagnostic signal rather than as resistance or an undesired struggle. When employees systematically rely on workarounds, informal networks, and legacy practices to keep daily operations running, this could indicate potential misfits between formal systems and daily operations. Leaders could use structured dialogues, bottom-up sessions and simple mapping tools to gain insights in where bootlegging is occurring and what it is trying to repair or protect, for example workload, quality standards, or (the lack of) knowledge flows.

Secondly, the four identified gaps (see Figure 17) provide a concrete view for understanding, reviewing, and addressing integration efforts: visibility (how well leaders know about and understand the informal workflow), credibility (alignment between messages and experience), synergy (whether knowledge and capabilities are actually shared), and operational / execution (fit between expectations and operational capacity). Decision-makers, leaders, or any other employees involved in future change implementations could use the framework (Table 4) as a checklist when designing or evaluating change initiatives, ensuring that bottom-up organizational, social, human, and cultural conditions are considered in parallel to the strategic top-down decisions.

Third, the strategic and tactical roadmap provide a step-by-step approach (see Figure 21 and Figure 22) for moving from a merger that is being sustained by survival bootlegging towards a more change-ready organisation. Horizon 1 focuses on reducing leadership distance, improving dialogic communication, and the stabilization of expectations. Horizon 2 focuses on cross-silo collaboration, knowledge preservation, and legacy acknowledgement. Horizon 3, being the final step of the plan before achieving the future vision, focuses on embedding learning routines and building an adaptive culture. For each horizon, the roadmap highlights who should be involved, the value proposition, needed resources, channels, and outcomes that realistically could be expected.

Finally, the findings of this research clearly present the importance of psychological safety and recognition of professional identity in PMI, if not any change implementation. Leaders, or any other decision-maker should actively invite critical feedback, be open to conversations about informal practices, and recognize the expertise that employees could bring. This reduces the need for purely defensive, and survival bootlegging and increases the chances that informal initiatives can be captured and integrated into formal structures and strategies, increasing potential organizational growth and synergy success.

16.4. Limitations

For this research, several limitations should be acknowledged.

As this research is based on a single case study within one sector and overarching group, the depth of the qualitative insights is a strength but could limit direct generalization to other contexts. Different industries, cultures or merger types may show slightly different forms of bootlegging and different interactions between formal and informal structures, making it an interesting base for future research.

Secondly, the research relies on empirical data of the conducted interviews and the input of the co-creation and stakeholder validation session. While a methodological analysis was conducted, the research remained qualitative and therefore did not include systemic quantitative measures of outcomes such as performance, turnover or success rates. As a result, the links between bootlegging and specific organizational outcomes, for example synergy realization or financial performance, remain somewhat interpretative rather than statistically tested.

Another potential limitation of this research is the fact that the data captures a particular period in the PMI process. The informal bootlegging practices are dynamic and may change as strategic plans change, structures stabilize, as leadership behaviour shifts, or as employees leave or join the organisation. A future longitudinal study could trace how these different types of bootlegging may over time evolve or disappear as conditions keep changing.

Finally, the researcher's connection to the case company offers contextual understanding but may have introduced an interpretive bias. Reflexive practices and supervisor feedback were used to mitigate this risk.

16.5. Future Research

When building on this research, several directions for future work could be considered.

First of all, it could be interesting to compare multiple merger cases in different sectors or countries. This could provide more insights and understanding on how different integration and implementation strategies, cultural backgrounds, and market conditions influence the appearance and way of bootlegging. Mixed research methods, qualitative and quantitative, could help clarify how informal practices relate to outcomes such as synergy rates, turnover or perceived change success over time.

This research could also be seen as a base for further exploration on which organizational mechanism helps companies to recognize and use bootlegging without losing control over their core processes. Examples include designing formal channels for sharing informal ideas, setting up safe spaces for experimentation and vocalization, or creating roles that translate informal practices into improvements of formal systems.

Another opportunity for future work is considering how the bootlegging perspective that is used in this research could be increasingly applied to other forms and levels of change, such as small-scale transitions, or large-scale changes such as digital transformations, restructurings, or public-sector reformations. Studying how formal change efforts and informal practices interact in these settings could deepen the understanding of when informal, bootlegging practices help an organisation to move forward, and when they keep deeper change and growth from happening.

Finally, if not most importantly, future research could further develop and dive deeper into the human-centered view on PMI change implementation and bootlegging that has been introduced in this research. This study has shown through interviews, co-creation, the framework and the strategic plan how valuable it is to consider an integration from the perspective of the people who must live with and work through the changes. Future work could build on this by examining in more detail how different stakeholder groups, across operational levels and legacy entities, experience the same strategic decisions, and how their sometimes conflicting values and needs could be included in the design of change initiatives.

Overall, this research has shown that post-merger change is not only a matter of structures and synergies, but rather of how people quietly hold organizations together when formal plans do not fully match operational expectations and reality. By placing bootlegging and lived experiences at its base, the research offers a step towards a more honest and human-focused view of integration and change implementation, one that treats informal practices not as negative side-effects of a strategy, but as essential signals for making future change more credible, workable, and worth committing to.

17. Personal Reflection

To conclude this research project, I would like to reflect on the personal path I took during this graduation.

Looking back on this graduation project, it feels like closing a chapter that was both heavier and more meaningful than I expected at first. It has been a path of ups and downs, but it remains one of the most enriching learning experiences of my studies. It allowed me to deepen my understanding of organizational change, bootlegging, and post-merger integrations, while growing as both a researcher and a strategic designer. As a student, I had worked once before with qualitative research methods, however never of this size, depth, and level of responsibility. Being able to follow a topic from an initial curiosity to a full research and strategic design has given me much more mature sense of what it means to do meaningful, academically grounded work in real organizational contexts.

My motivation for this project was strongly based on personal experiences. During my student job at the case company, I had witnessed first-hand how post-merger integration affected people's responses, daily work, their sense of belonging and their motivation. Those experiences stayed with me and made mergers and acquisitions feel a bit more tangible than they were to me before. Returning to the organisation as a researcher provided me the opportunity to revisit those complications with more distance, structure and purpose. I learned how to translate personal observations into researchable questions, to listen systemically to different perspectives and to connect individual stories to broader patterns and underlying mechanisms.

Through this process, I gained confidence in working with complex qualitative data and handling a project of this scope more independently. Designing and executing a large case study forced me to learn how to make and handle methodological as well as strategic choices. I improved my skills in moving back and forth between theory and practice, allowing the research insights to be more in-depth and the design results to be better argued. At the same time, the project confronted me with several challenges.

The scope of the work at times felt a bit overwhelming. Combining literature, fieldwork, analysis, co-creation, strategic implications and validation into one coherent story required a level of structure and skill I had never 'tested' before. I had to learn better how to set clear priorities, accept that not everything could be explored in full depth and argument my decisions and choices well. Another challenge was my personal involvement with the case company. As I knew the context and some of the people, the findings were not just academically interesting, they were sometimes also emotionally loaded. Hearing about brain drain, feelings of invisibility and lack of guidance made me something doubt what I had to offer for them. However, because of these moments, I gained extra motivation to do well, make them feel heard and understood, and provide a solution for the complexities that I heard about and saw.

In complex moments, the support and challenge from my supervisors were truly helpful. Whenever I felt lost in the complexity of the case or doubted myself, their questions, feedback and encouragement helped to zoom out and reconnect with the core of the research. They pushed me to sharpen my argumentations and remained honest about the overall contribution I could be providing. I am especially grateful for the balance they offered between support and challenge, creating a safe space for doubts, while at the same time not letting me stay in doubt for too long. I learned how to better deal with uncertainties and improved my academic skills.

Despite the challenges, the project has left me with a stronger and more positive sense of my professional identity. I already considered, the impact, but was impressed with how crucial bottom-up dynamics are in organizational strategies, as well as how easily they are overshadowed and 'forgotten'. Through the interviews, co-creation sessions, and analysis, I saw how informal workarounds are often rational human responses to misaligned systems and perceived unfairness, deepening my appreciation for the informal layer of organisations. At the same time, this research clarified the type of designer I aspire to be: someone who truly considers the different perspectives of stakeholders. Truly listening to their insights and experiences, so that future strategic designs would not be another top-down implementation. What I take with me strongly is a desire to remain human-oriented, keeping lived experiences at all levels visible in even the most strategic decisions. In the end, without all people, at whatever level, we cannot really move forward.

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Appendix

Appendix 1 - Graduation Project Brief





IDE Master Graduation Project

Project team, procedural checks and Personal Project Brief

In this document the agreements made between student and supervisory team about the student's IDE Master Graduation Project are set out. This document may also include involvement of an external client, however does not cover any legal matters student and client (might) agree upon. Next to that, this document facilitates the required procedural checks:

- Student defines the team, what the student is going to do/deliver and how that will come about
- Chair of the supervisory team signs, to formally approve the project's setup / Project brief
- SSC E&SA (Shared Service Centre, Education & Student Affairs) report on the student's registration and study progress
- IDE's Board of Examiners confirms the proposed supervisory team on their eligibility, and whether the student is allowed to start the Graduation Project

STUDENT DATA & MASTER PROGRAMME

Complete all fields and indicate which master(s) you are in

Family name	<input type="text" value="xxx"/>	IDE master(s) IPD	<input type="checkbox"/>	Dfi	<input type="checkbox"/>	SPD	<input checked="" type="checkbox"/>
Initials	<input type="text" value="xxx"/>	2 nd non-IDE master	<input type="text"/>				
Given name	<input type="text" value="xxx"/>	Individual programme <i>(date of approval)</i>	<input type="text"/>				
Student number	<input type="text" value="xxx"/>	Medisign	<input type="checkbox"/>				
		HPM	<input type="checkbox"/>				

SUPERVISORY TEAM

Fill in the required information of supervisory team members. If applicable, company mentor is added as 2nd mentor

Chair	<input type="text" value="Shahrokh Nikou"/>	dept./section	<input type="text" value="DOS/RMCR"/>	<p>! Ensure a heterogeneous team. In case you wish to include team members from the same section, explain why.</p> <p>! Chair should request the IDE Board of Examiners for approval when a non-IDE mentor is proposed. Include CV and motivation letter.</p> <p>! 2nd mentor only applies when a client is involved.</p>
mentor	<input type="text" value="Nikolaos Kyriakopoulos"/>	dept./section	<input type="text" value="DOS/DIVE"/>	
2 nd mentor	<input type="text" value="Sebastian Booch"/>			
client:	<input type="text" value="(ANONYMOUS)"/>			
city:	<input type="text" value="Delft"/>	country:	<input type="text"/>	
optional comments	<input type="text"/>			

APPROVAL OF CHAIR on PROJECT PROPOSAL / PROJECT BRIEF -> to be filled in by the Chair of the supervisory team

Sign for approval (Chair) _____

Name Date Signature _____

CHECK ON STUDY PROGRESS

To be filled in by SSC E&SA (Shared Service Centre, Education & Student Affairs), after approval of the project brief by the chair. The study progress will be checked for a 2nd time just before the green light meeting.

Master electives no. of EC accumulated in total _____ EC

Of which, taking conditional requirements into account, can be part of the exam programme _____ EC

<input type="checkbox"/>	YES	all 1 st year master courses passed
<input type="checkbox"/>	NO	missing 1 st year courses

Comments:

Sign for approval (SSC E&SA)

Name _____ Date _____ Signature _____

APPROVAL OF BOARD OF EXAMINERS IDE on SUPERVISORY TEAM -> to be checked and filled in by IDE's Board of Examiners

Does the composition of the Supervisory Team comply with regulations?

<input type="checkbox"/>	YES	Supervisory Team approved
<input type="checkbox"/>	NO	Supervisory Team not approved

Comments:

Based on study progress, students is ...

<input type="checkbox"/>	ALLOWED to start the graduation project
<input type="checkbox"/>	NOT allowed to start the graduation project

Comments:

Sign for approval (BoEx)

Name _____ Date _____ Signature _____



Personal Project Brief – IDE Master Graduation Project

Name student xxxx

Student number 0

PROJECT TITLE, INTRODUCTION, PROBLEM DEFINITION and ASSIGNMENT

Complete all fields, keep information clear, specific and concise

Project title Building a cohesive corporate culture: a strategic design for the overarching group

Please state the title of your graduation project (above). Keep the title compact and simple. Do not use abbreviations. The remainder of this document allows you to define and clarify your graduation project.

Introduction

Describe the context of your project here; What is the domain in which your project takes place? Who are the main stakeholders and what interests are at stake? Describe the opportunities (and limitations) in this domain to better serve the stakeholder interests. (max 250 words)

This project connects strategic design and organisational culture to understand and handle the complexities of unifying a diverse group of companies into a single, cohesive entity.

Organisational culture, defined as a system of shared values and assumptions that shape behaviour (Cilliers & Greyvenstein, 2012), often becomes a challenge in mergers and acquisitions (M&A). When cultures clash or fail to integrate, they often create friction, fragmentation, and a 'silo effect', which are common reasons for organisational underperformance (Smeulders et al., 2023).

In practice, without a shared framework, companies risk misaligned objectives and a weak sense of purpose, which can influence collaboration and reduce the M&A's potential (Bianchini et al., 2018). This is particularly relevant for the case company, whose current focus is on the alignment of operations and internal culture across its new acquisitions. The Masterworks Business System (MBS) has been created as a unifying platform, to better serve its customers and stay competitive. However, its success depends on how well in which way it will be adopted. To address this challenge, this project uses the dynamic capabilities framework to explore how the overarching group could adapt its organisational behaviour. This will be supported by the orchestration theory, which presents managerial actions that are needed to align the resources around the shared vision (Sirmon et al., 2007).

The goal of this project is to introduce the MBS in the overarching group in a way that stimulates a unified culture, motivates employees, which will ultimately strengthen collaboration (Christopher & Edwinah, 2022). By aligning practices and bridging cultural differences, the group can move from fragmented operations to a coordinated organisation that creates value for all stakeholders.

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Introduction (continued): space for images

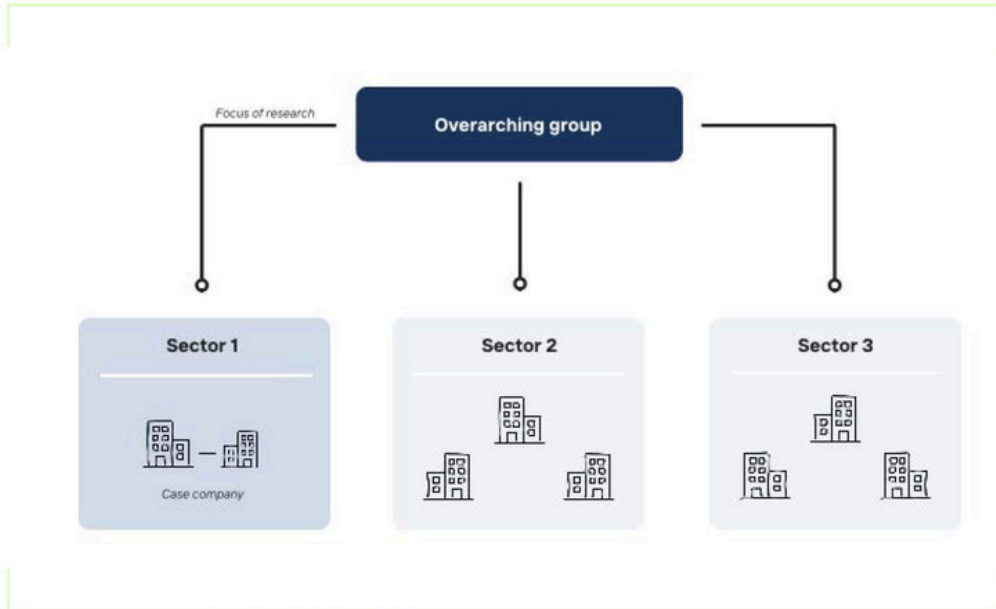


image / figure 1 Structure of the overarching Group

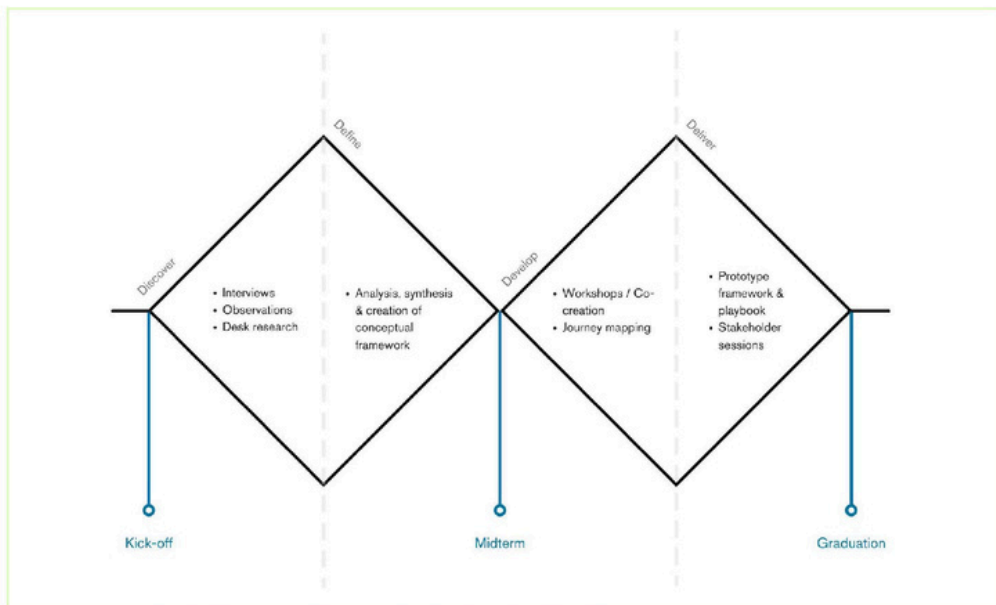


image / figure 2 The Double Diamond design method (Design Council, n.d.).

Project planning and key moments

To make visible how you plan to spend your time, you must make a planning for the full project. You are advised to use a Gantt chart format to show the different phases of your project, deliverables you have in mind, meetings and in-between deadlines. Keep in mind that all activities should fit within the given run time of 100 working days. Your planning should include a **kick-off meeting, mid-term evaluation meeting, green light meeting and graduation ceremony**. Please indicate periods of part-time activities and/or periods of not spending time on your graduation project, if any (for instance because of holidays or parallel course activities).

Make sure to attach the full plan to this project brief.
The four key moment dates must be filled in below

Kick off meeting	8 Sep 2025
Mid-term evaluation	24 Nov 2025
Green light meeting	29 Jan 2026
Graduation ceremony	6 Mar 2026

In exceptional cases (part of) the Graduation Project may need to be scheduled part-time. Indicate here if such applies to your project

Part of project scheduled part-time	<input type="checkbox"/>
For how many project weeks	<input type="text"/>
Number of project days per week	<input type="text"/>

Comments:

Motivation and personal ambitions

Explain why you wish to start this project, what competencies you want to prove or develop (e.g. competencies acquired in your MSc programme, electives, extra-curricular activities or other).

Optionally, describe whether you have some personal learning ambitions which you explicitly want to address in this project, on top of the learning objectives of the Graduation Project itself. You might think of e.g. acquiring in depth knowledge on a specific subject, broadening your competencies or experimenting with a specific tool or methodology. Personal learning ambitions are limited to a maximum number of five.
(200 words max)

As a strategic product design student, I am motivated by how design thinking can create impact in complex corporate environments. This project allows me to combine my passion for design with my interest in organisational dynamics and culture. Through experience, I have learned that a company's success depends not only on strategy, but also on employees' sense of purpose and connection, factors that are often overlooked by top-down management. With my design competencies in problem framing, co-creation, human-centered design, and strategic thinking, I aim to address this system-level challenge. Rather than designing rules, I like to design through collaboration and values. My ambition is to create a practical toolkit that supports the AAT Group and may offer value to other organisations struggling with similar issues.

Personal learning ambitions:

1. Learn how to manage a large-scale project independently, strengthening my confidence and knowing when to ask for help.
2. Learn how to communicate and navigate with professionals at different organisational levels, ensuring the project connects with all stakeholders.
3. Experimenting with collaborative design methods to create a shared sense of ownership of the final outcome.
4. Gaining in-depth knowledge on corporate cultures, understanding its driving factors, and making it a 'tangible' asset.
5. Expanding my personal network within this industry, learning for and from this project.

Personal Project Brief – IDE Master Graduation Project

Problem Definition

What problem do you want to solve in the context described in the introduction, and within the available time frame of 100 working days? (= Master Graduation Project of 30 EC). What opportunities do you see to create added value for the described stakeholders? Substantiate your choice. (max 200 words)

The problem this project will address is the misalignment between the overarching group's strategic ambition for a unified direction and the fragmented interests of its individual companies. As the group is expanding through acquisitions, the different business units often continue to operate (partly) independently, creating silos that limit information and knowledge sharing and limit collaboration (Jeske & Olsen, 2024). Without an overarching system to align the objectives from the different parties, the group risks performing less than its potential, weakening both the cohesive brand and long-term value creation (Bianchini et al., 2018). This fragmentation creates a knowledge gap between all different organisational levels, preventing the development of synergies that would benefit all stakeholders. This project will therefore focus on and explore the key causes of this fragmentation and design a solution that supports cultural and operational integration within the overarching group. The goal is to deliver a research-based framework and practical playbook, based on the MBS, that stimulates alignment, collaboration, and strengthens the overall group performance. I believe this project will be offering value at multiple levels: leadership and investors gain greater cohesion and unlocked growth potential, management teams benefit from smoother collaboration and efficiency, and employees experience stronger inclusion and shared purpose. By focusing on the cultural alignment and operational cohesion, this project will offer the overarching group a clear path on how to overcome and deal with fragmentation and build a unified culture that drives the group's sustainable growth and shared success.

Assignment

This is the most important part of the project brief because it will give a clear direction of what you are heading for. Formulate an assignment to yourself regarding what you expect to deliver as result at the end of your project. (1 sentence) As you graduate as an industrial design engineer, your assignment will start with a verb (Design/Investigate/Validate/Create), and you may use the green text format:

Design a cultural framework, with practical guidelines and a prototype, that introduces the Masterworks Business System into the overarching group, enabling a cohesive way of working (internal culture) that strengthens shared values and reduces cultural and operational divides.

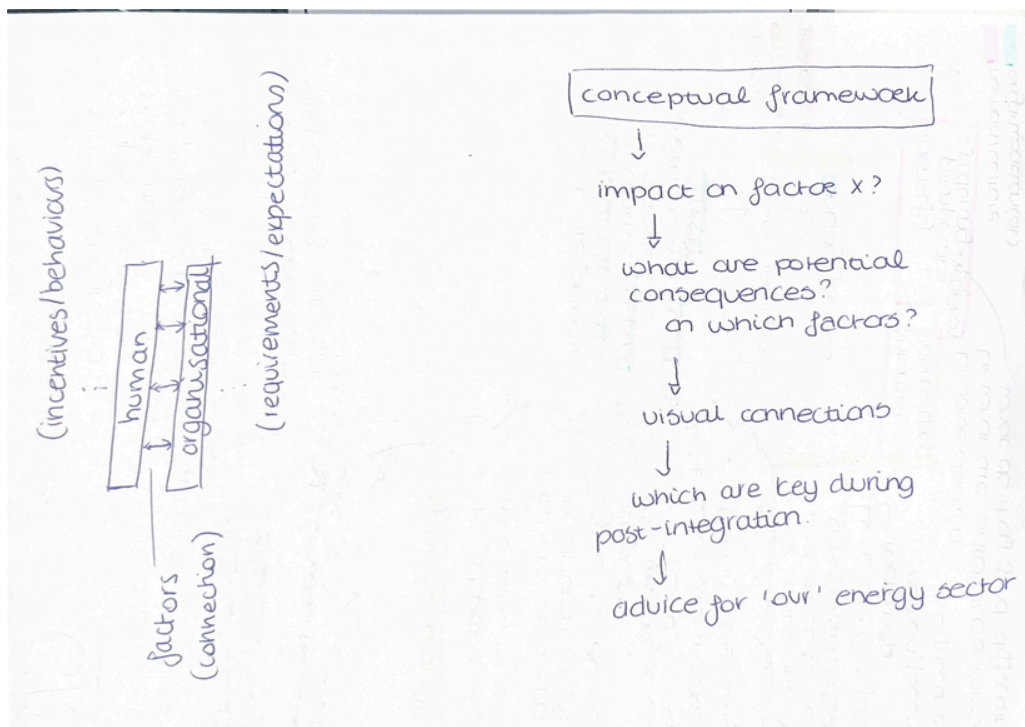
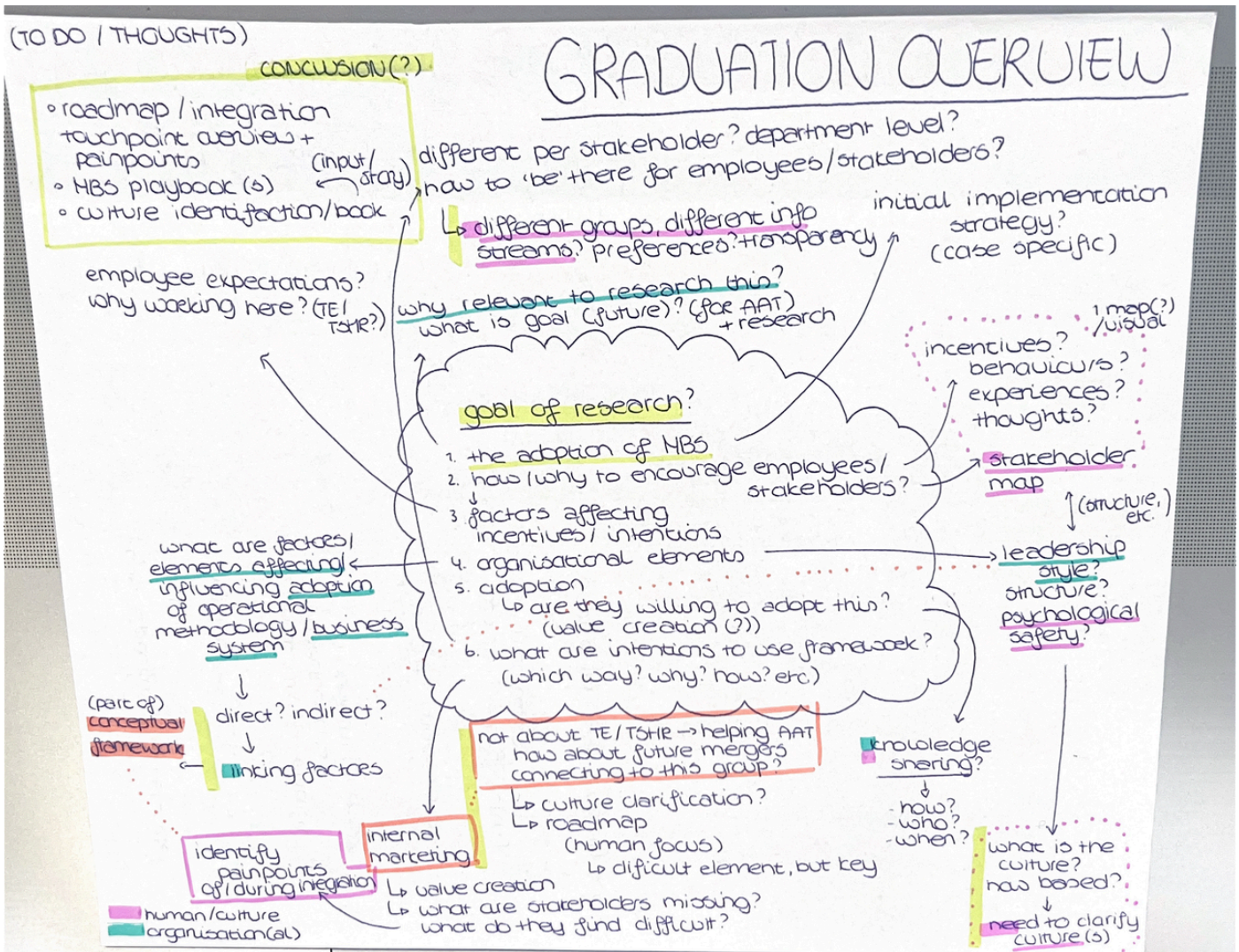
Then explain your project approach to carrying out your graduation project and what research and design methods you plan to use to generate your design solution (max 150 words)

For this project, I will be using the four phases of the Double Diamond design method (see figure 2). This will be done to ensure both structure and flexibility. First, in the discover phase, interviews, observations, and desk research will be used to understand how the case company currently operates. Next, in the definition phase, the findings will be translated into clear priorities and criteria that highlight where change might be most needed. The develop phase will bring stakeholders together in workshops/co-creation sessions to create and refine practical ideas for the cultural framework and prototype of a new change implementation. Finally, in the deliver/implementation phase, these ideas will be shaped into a prototype framework, tested in practice, and improved through feedback and pilot evaluations. Throughout this project, different tools such as qualitative (semi-structured) interviews, co-creation, and stakeholder validation will be used to ensure the outcome will be realistic, actionable, and supported across the different layers of the organisation.

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Appendix 2 - Thesis Brainstorm Example



Appendix 3 - Literature Review Procedure

As the topic of this research was considered to be complex due to its different influential factors, research was done by reviewing different academic papers.

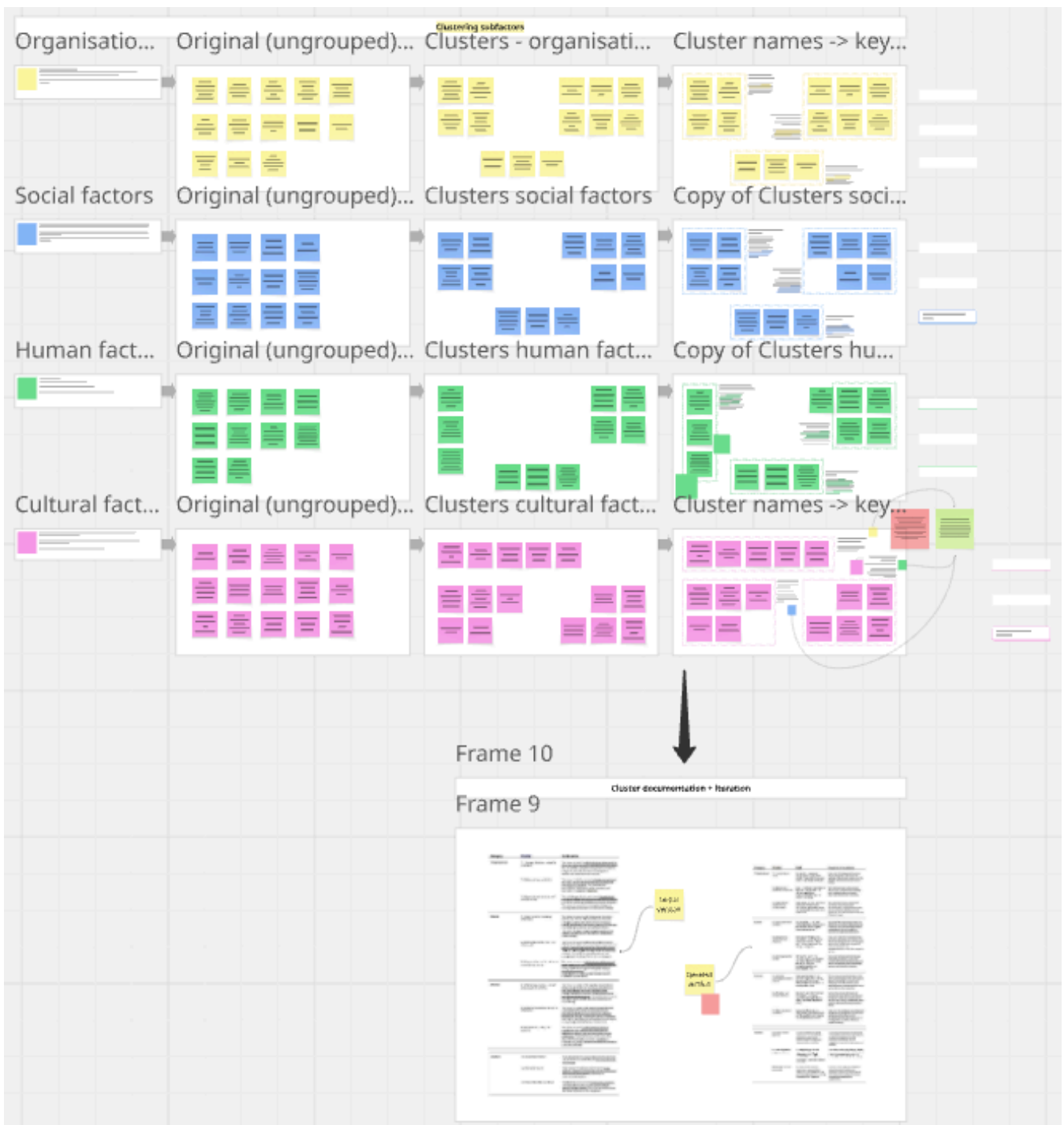
1. Papers were retrieved based on relevance, topic and value
2. Different questions or topics were presented per paper / topic to structure insights
3. Conclusions were drawn based on what different papers concluded regarding the topics / questions
4. Gaps and insights could be identified



Conceptual framework - core categories



- 5.4 core themes (organisational, social, human, cultural were identified)
6. Per theme different impact factors were considered, clustered and eventually framed into their representative impact dimension, which are presented and translated in the known 'conceptual framework'



Appendix 4 - Consent Form Interview

Consent Form - Interview

Dear participant,

You are being invited to participate in a research study titled: *Investigating change implementation during post-merger integration: the formal and informal influences*. This study is being done by Rosemarijn Broere from the TU Delft in collaboration with the AAT Group, previously known as the Skalar Group, and is part of a thesis project from the Master study Strategic Product Design from the faculty of Industrial Design Engineering.

The purpose of this research study is to gain insights into the (employee experienced) factors that influence the introduction of a new change during post-merger integration and will take you approximately one hour (60 minutes) to complete. During this interview, if approved, an audio recording will be made and transcribed to ensure that the findings are processed as accurately as possible.

All collected data will be used for a Master's graduation project at the TU Delft. The project outcomes include a final report, three presentations, and a final deliverable/document. The final report and deliverable will be made publicly available after the project is completed. The audio recordings will be deleted no later than one month after the project's completion (by April 2026). By participating, you agree that the transcripts may only be used within the context of this project.

Your participation in this study is entirely voluntarily, and **you may withdraw at any given time** without needing to provide a reason. You are free to skip any questions or decline to take part in certain activities, without any consequences.

If you have any questions about the study, this consent form, or if you have any comments or concerns, please contact:

████████████████████
████████████████████
████████████████████

PLEASE TICK THE APPROPRIATE BOXES	Yes	No
A: GENERAL AGREEMENT – RESEARCH GOALS, PARTICIPANT TASKS AND VOLUNTARY PARTICIPATION		
1. I have read and understood the study information, or it has been read to me. I have been able to ask questions about the study and my questions have been answered to my satisfaction.	<input type="checkbox"/>	<input type="checkbox"/>
2. I consent voluntarily to be a participant in this study and understand that I can refuse to answer questions, and I can withdraw from the study at any time, without having to give a reason.	<input type="checkbox"/>	<input type="checkbox"/>
3. I understand that taking part in the study involves: <ul style="list-style-type: none"> • A transcription will be taken from this interview. • The transcripts within a month after completion of this research project will be deleted/destroyed. 	<input type="checkbox"/>	<input type="checkbox"/>
B: POTENTIAL RISKS OF PARTICIPATING (INCLUDING DATA PROTECTION)		
5. I understand that my participation means that personally identifiable information and research data will be collected, and that there is a small risk I could be identified from this information.	<input type="checkbox"/>	<input type="checkbox"/>
6. I understand that the anonymised information collected about me, may be used in the research report and will be publicly available in the Delft repository after the publication date.	<input type="checkbox"/>	<input type="checkbox"/>
7. I understand that the personal information that could identify me, will not be shared outside the researcher.	<input type="checkbox"/>	<input type="checkbox"/>
8. I understand that the (identifiable) personal data I provide will be destroyed no later than the 6 th of April.	<input type="checkbox"/>	<input type="checkbox"/>
C: RESEARCH PUBLICATION, DISSEMINATION AND APPLICATION		
9. I understand that after the research study the de-identified information I provide may be used in the publication of the graduation report, presentations, or any other final project deliverable. This information may also be shared with the AAT Group.	<input type="checkbox"/>	<input type="checkbox"/>
10. I agree that my responses, views or other input may only be quoted anonymously in research outputs after consolidating me first.	<input type="checkbox"/>	<input type="checkbox"/>
D: (LONGTERM) DATA STORAGE, ACCESS AND REUSE		
16. I give permission for the de-identified data (the anonymised interview transcript insights) collected about me, to be archived in the Education Repository so that it may be used for future research and educational purposes.	<input type="checkbox"/>	<input type="checkbox"/>
17. I understand that access to this anonymised data (the insights of the study) will be publicly available to TU Delft students and staff, as well as employees from the AAT Group.	<input type="checkbox"/>	<input type="checkbox"/>

Signatures

Name of participant

Signature

Date

I, as researcher, have accurately read out the information sheet to the potential participant and, to the best of my ability, ensured that the participant understands to what they are freely consenting.

Researcher name

Signature

Date

Study contact details for further information:

Appendix 5 - Interview Protocol

Interview questions

Introduction text

This introduction will explain the purpose and structure of the interview. The main goal is to collect insights from employees about recent company changes, helping to understand how people successfully handle and adapt during these changes.

Privacy & confidentiality

Your participation in this interview is entirely confidential and anonymous. This means:

- Name, and answers that could lead back to your identity will not be shared with the company, or anyone outside of the TU Delft research team.
- Your information will only be used for this academic study, and will be anonymised.
- *It is encouraged to share your experiences honest and openly.*

Interview structure

The interview is structured around four main topics. The questions are designed to explore your personal experiences and ways of finding solutions with regards to the changes that took place during the last (almost) year.

The four topics that will be discussed, are:

- **Organisation:** these questions will focus on the company 'rules', resources, and the perceived guidance from management.
- **Social:** these questions will explore teamwork, relationships with colleagues, and how knowledge moves around the workplace.
- **Human:** these questions cover personal feelings, attitudes, and motivation during change.
- **Cultural:** these question address the general work environment you are working in.

Please note, that *all answers are right* and you are allowed to skip any question at any time possible!

General introduction

- I. What is your current role within the organisation?
- II. Which company were you working for before the merger/change took place?

Organisational questions

- III. Regarding the changes you have experienced over the last almost year, how clearly did management communicate the new direction and provide the necessary resources?
 - a. Did unclear or insufficient guidance ever lead you to adapt your work in ways that were not formally requested or approved?
- IV. When dealing with changes, did the company requests or formal processes needed to be adjusted to get your daily work and/or targets done?
 - a. To what extent did you intentionally choose not to escalate or officially report these adjustments?

- b. When dealing with these adjustments did you always wait for official approval, or did you take initiative to work around the system?
- V. During this period of change, how did you experience the possibility of sharing thoughts, solutions, or other ideas regarding your personal tasks or organisational goals?
 - a. Were there instances where you developed ideas or solutions but chose not to share them formally? Why?
 - b. Did you feel more comfortable experimenting with ideas individually or in small informal groups rather than through official channels?

Social questions

- VI. What aspects would you say influence the comfortability people feel for taking (personal) initiative(s)?
 - a. How do colleagues influence whether someone risks taking initiative outside standard procedures?
 - b. Do informal team norms make it easier or harder to take unrequested initiatives?
- VII. When looking for solutions, do you seek the advice from specific colleagues?
 - a. What makes these colleagues the ones you turn to (e.g. expertise, trust, or the ability) to help outside formal procedures?
 - b. Do you ever collaborate informally with colleagues on tasks not explicitly assigned?
- VIII. What is your experience about knowledge sharing culture and access to knowledge?
 - a. If getting necessary information through the standard channels was difficult, which methods did you use to find the knowledge you needed?
 - b. Did you rely on unofficial documents, private chats, side discussions, or informal groups?
 - c. Were there moments when colleagues shared information “under the radar” to help you progress?

Human questions

- IX. Has the current changes have had any influence on your sense of security or certainty about your individual role?
 - a. Did your sense of security or uncertainty about your role motivate you to personally focus on new solutions or tasks to gain clarity?
 - b. Did you pursue these solutions on your own initiative, even if they were not formally requested or defined in your role?
- X. To what extent do you feel safe to speak up or voice concerns regarding your personal tasks or the (new) changes?
 - a. If you did not feel fully safe to speak up, did you sometimes choose to work through issues independently instead?

- b. Have you ever preferred to test or explore an idea privately before sharing it (or instead of sharing it)?
- XI. How much does your confidence in your own abilities encourage you to take action in solving problems in new ways?
 - a. Do you sometimes take initiative even when you are not sure whether it fits within formal expectations?
 - b. Do you feel confident enough to act independently without always asking for approval?
 - c. Were there times when you preferred to work on an idea or solution privately first, rather than going through formal steps or approvals? What motivated that choice?

Cultural questions

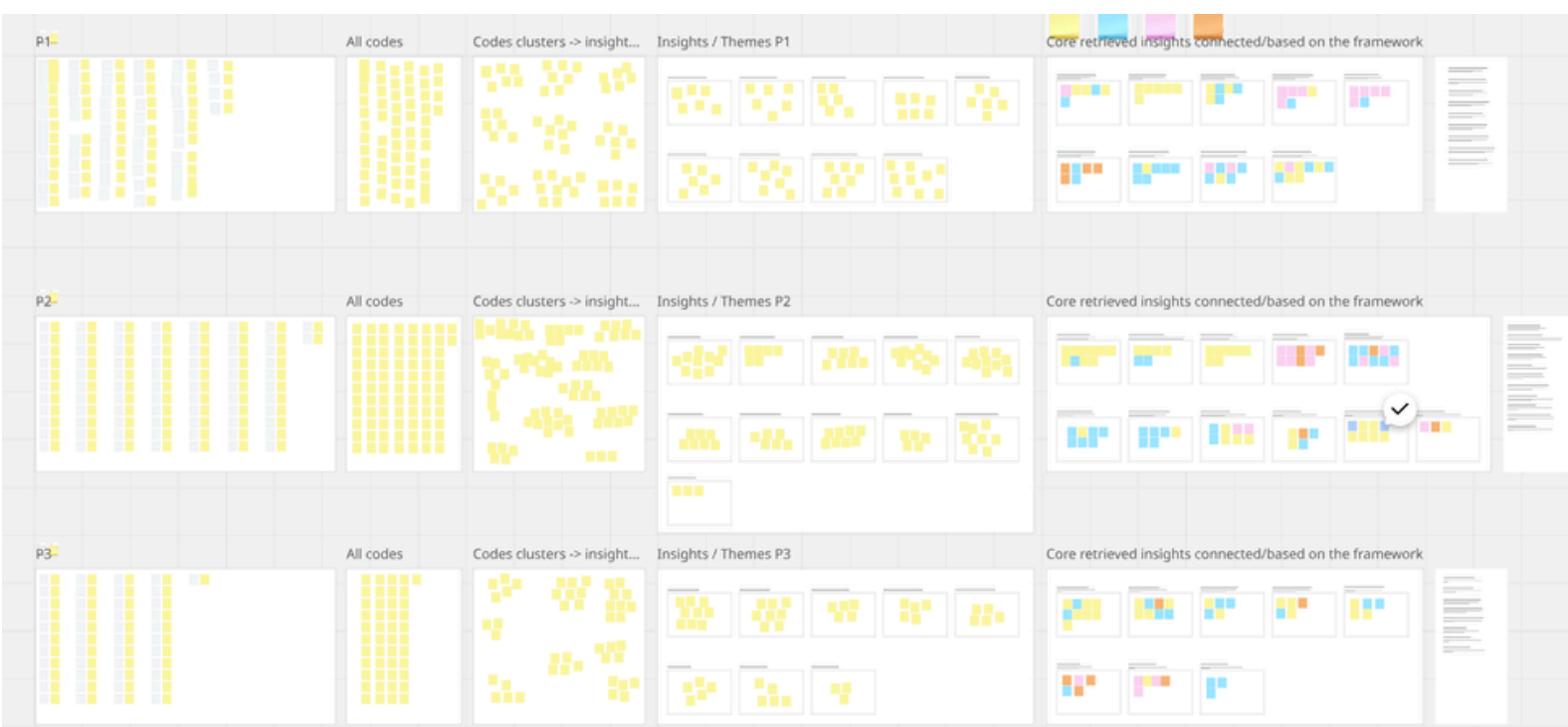
- XII. According to your experience as employee of TE Instruments/TSHR, how well did the existing formal practices and systems fit with the new requirements (created by the changes)?
 - a. Did you feel the need to work around these systems to meet expectations?
 - XIII. What are the common behaviours in your workplace regarding the exploration of new methods and initiatives outside your defined tasks and targets?
 - a. Are such initiatives seen as proactive, risky, or inappropriate?
 - XIV. If a new method, solution or perspective emerged from an employee initiative, how quickly would the company adopt this practice?
 - a. Do employees typically share these initiatives openly, or do they first develop them informally before presenting them?
 - b. Does the company expect ideas to go through formal approval, or is there room for unofficial experimentation?
 - XV. Did the recent changes require you to learn or develop skills that were not covered by the company's formal system/training?
 - a. Do you feel you need additional training in order to adapt to new changes?
 - b. How did you go about acquiring these skills such as formally, or through informal self-directed methods?
 - c. Did you rely on unofficial sources, colleagues, or private experimentation?

Appendix 6 - Interview Analysis

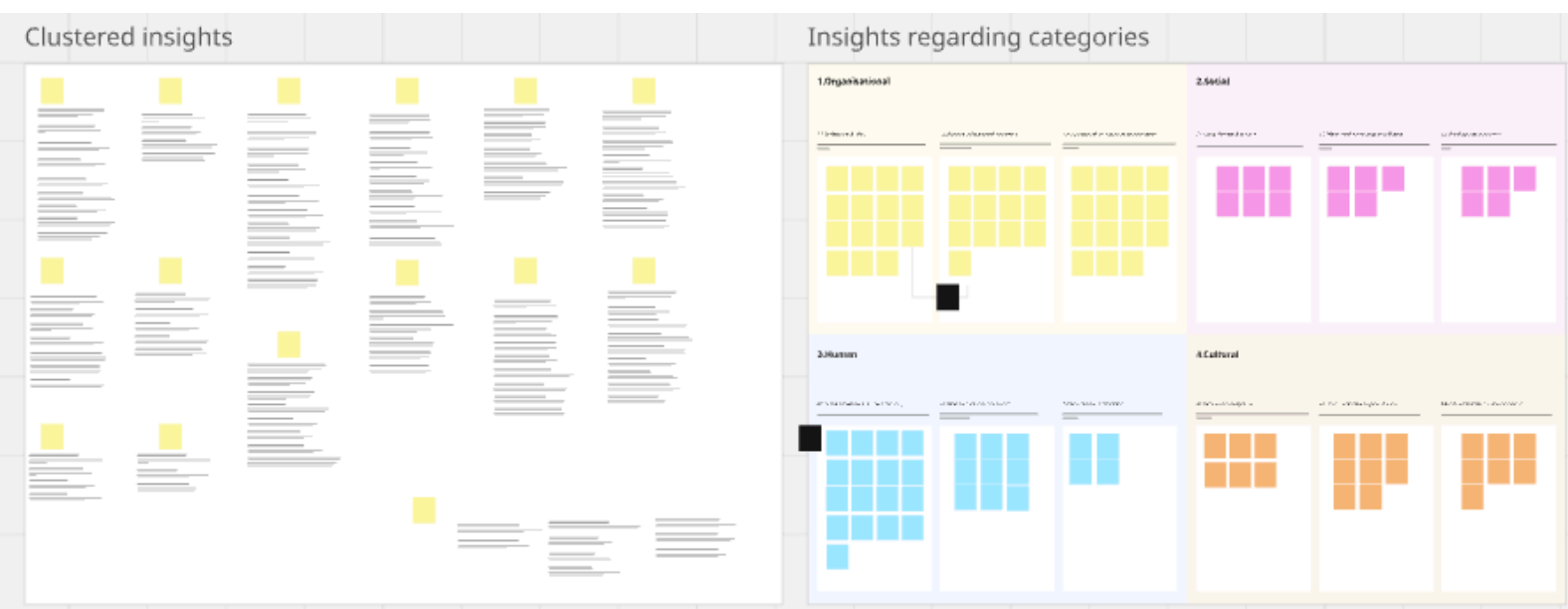
Note: due to sensitivity and confidentiality of the topic, a picture is added to understand the principle of the interview synthesis. As was mentioned in the data analysis section, data was analysed and synthesised through a thematic analysis.

The different frames on the visual present:

- Each line = 1 interview (done for 15 interviews)
- Step 1: quotes
- Step 2: codes
- Step 3: clustering of the codes
- Step 4: theme clustering + naming
- Step 5: defining insights



After retrieving all the insights, insights were clustered and defined as core dimensions regarding the different impact categories.



Appendix 7 - Interview Insights

Interview 1

1.1. Insight 1: absent and disconnected leadership

This insight is about the feeling that leaders are missing in action, not checking in, or communicating poorly, leaving staff feeling under supported.

1.1. Insight 2: overloaded with too few resources

This insight highlights the reality of the workload: there is simply too much to do and not enough people or support to do it.

1.2. Insight 3: improvising to get things done

This insight describes how employees are forced to make things up as they go, bypassing official rules or taking extreme measures just to keep things working.

1.4. Insight 4: relying on personal trust over systems

This insight shows that because official channels are unclear, people have to rely on their own personal relationships and assertiveness to find answers.

1.5. Insight 5: building walls and 'us vs. them'

This insight is about how stress is causing teams to split apart, protect their own thing(s), and view others within the company as outsiders or competition.

1.6. Insight 6: feeling alienated by the new culture

This insight focuses on the clash of values: employees feel disconnected from the new brand, viewing it as greedy or foreign compared to what they knew.

1.7. Insight 7: personal uncertainty and loss of drive

This insight looks at the internal struggle of the employee: questioning why they are there, feeling insecure, and losing their emotional connection to the job.

1.8. Insight 8: feeling unappreciated and unfairly rewarded

This insight focuses on the perceived unfairness of the exchange: employees feel they are giving extra effort, time, and emotional energy, but receiving little empathy, recognition, or financial reward in return.

1.9. Insight 9: being locked out of decision-making

This insight highlights the frustration of having the expertise to help, but being systematically excluded from the planning, strategy, and design of the very systems they are expected to use.

Interview 2

2.1. Insight 1: living in constant uncertainty

This insight is about the confusion caused by a lack of clear (communicated) plans. It shows how employees feel lost because management hasn't provided a clear path forward.

2.2. Insight 2: trapped by conflicting demands

This insights captures the structural failure/challenges of the hierarchical system. It is not just about having two employers; it is about being caught in the crossfire of opposing priorities and competing authority, creating a pressure that lead to influences on employee wellbeing

2.3. Insight 3: losing important knowledge

This insight focuses on how hard it is to find information. It shows that valuable knowledge is disappearing because people are leaving and systems are not working.

2.4. Insight 4: sticking to old teams for 'safety'

This insights shows how employees are staying close to their original groups for support, which creates barriers between the old and new teams ('us vs. them')

2.5. Insight 5: fear of speaking up

This theme shows that employees are afraid to share honest feedback or ideas because they worry about the potential related consequences or think it does not matter or is not even considered.

2.6. Insight 6: breaking rules to get work done

This insight shows a paradox: the official rules are so broken that employees feel they have to ignore them just do their jobs effectively.

2.7. Insight 7: uncertainty about job security and role

This insight goes beyond normal stress. It rather groups the codes related to the intense fear employees have about losing their jobs or their careers stalling.

2.8. Insight 8: losing faith in leadership

This insight focuses on the relationship between staff and management. It shows that employees feel betrayed by broken promises and a lack of honesty. (It creates skepticism)

2.9. Insight 9: a new hierarchy (dislike)

This insights represents the culture clash where employees who are used to more freedom are resisting the new, stricter hierarchical chain.

2.10. Insight 10: unprepared and untrained for new roles

This insight covers the practical problem that employees are being asked to do new jobs without necessary training, onboarding, or skills.

2.11. Insight 11: no room for new ideas

This insight shows that the high workload and stress are killing creativity and preventing any new improvements from happening.

Interview 3

3.1. Insight 1: moving to a strict hierarchy

This insight describes the change from a flexible workplace to one that is more strict, 'slow', and rule-based.

3.2. Insight 2: having no say in decisions

This insight highlights how employees feel silenced and ignored by managers who make all the choices without asking for input

3.3. Insight 3: feeling undervalued and unproven

This insight covers the personal struggle of employees who feel their skills are no longer respected and that they have to prove their worth all over again.

3.4. Insight 4: erasing past work and achievements

This insights shows the codes about the new company stopping old projects and discarding the knowledge of employees that has been build up over time.

3.5. Insight 5: struggling with incompatible systems

This insight focuses on the practical problems where the new software, tools, or processes do not work well for the job tasks.

3.6. Insight 6: loss of team spirit

This insight focuses on how the culture shifted from people helping each other to people blaming each other and looking only at themselves.

3.7. Insight 7: feeling like an outsider

This insight looks at the 'us vs. them' divide, where employees feel unwelcome or hostile toward the new group.

3.8. Insight 8: living with uncertainty

This insight captures the general anxiety and confusion about what the future holds for the merger and corresponding changes.

Interview 4

4.1. Insight 1: overly grand communication

This insight highlights that announcements (especially from the group) were being perceived as too flashy, expensive, or disconnected from reality.

4.2. Insight 2: absence of people leadership

This insight shows that managers focused purely on tasks and failed to support or listen to their employees.

4.3. Insight 3: mismatch with acquirer's culture

This insight highlights the friction caused by the new company forcing new rules and style into the existing team without perceived respect for local behaviours and habits.

4.4. Insight 4: ignoring / under validating operational expertise

This insight points out that high-level strategy was made without the consolidation the people doing the actual work, leading to maybe not the most efficient decisions.

4.5. Insight 5: dominance of gossip and rumours

This insight shows that because official communication was lacking, the 'real' news came through leaks, gossip, and cliques.

4.6. Insight 6: loss of shared purpose

This insight captures the emotional side of the change, where employees felt separated / disconnected and stopped caring about the company mission and vision.

4.7. Insight 7: taking personal initiative

This insight about the interviewee is about stepping up to lead and manage the situation personally, rather than waiting for instructions.

Interview 5

5.1. Insight 1: anticipating the change

This insight covers the period before the formal announcement, focus on how employees picked up on subtle cues, external signals, and rumours that a major transition was coming.

5.2. Insight 2: information misalignment

This insight highlights the gap between what management said and what was actually happening, leading to a reliance on gossip and a desire for more honest, direct communication.

5.3. Insight 3: individual adaptation

This insight focuses on how different employees reacted personally to the news, ranging from initial resistance to quick acceptance, and how factors like age influenced their ability to adapt.

5.4. Insight 4: leadership absence

This insight addresses the perceived distance of management, highlighting a lack of visibility, physical presence, and the feeling that leaders were not making an effort to connect with the staff.

5.5. Insight 5: negative work climate

This insight explores the emotional toll of the change, specifically how a lack of safety and a drop in motivation created a stressful and pessimistic atmosphere across the team.

5.6. Insight 6: team self-reliance

This insight captures how the team took matters into their own hands to create order out of chaos, finding new ways to solve problems, and build consensus without waiting for top-down direction.

5.7. Insight 7: knowledge barriers

This insight looks at the difficulties in sharing information, including the over-reliance on a few key people, and the intentional or accidental hoarding of knowledge that slowed down the transition.

5.8. Insight 8: stability priorities

This insight describes a shift in work focus where the team prioritises maintaining day-to-day operations and quality and 'playing it safe' over taking risks, or pursuing new innovative ideas.

5.9. Insight 9: integration conflict

This insight focuses on the friction between the two merging organisations, specifically the feeling that one side dominated the process and was viewed as an 'outsider' or opponent.

5.10. Insight 10: impersonal management

This insight addresses a 'by-the-numbers' approach to management that often lacks empathy, fails to provide proper training, and treats staff reductions as a purely rational rather than a human process.

Interview 6

6.1. Insight 1: announcement mismanagement

This insight describes the chaos surrounding the initial reveal of the change, where poor timing and the absence of key leaders created a sense of shock and unprofessionalism.

6.2. Insight 2: persistent information gaps

This insight focuses on the ongoing struggle of employees to stay informed, dealing with delays, gossip, and systemic communication failures that left staff feeling disconnected.

6.3. Insight 3: operational regression

This insight highlights how the transition forced work methods backward, introducing manual, inefficient, and chaotic tasks that undermined years of previous progress.

6.4. Insight 4: workload intensification

This insight covers the physical and mental toll of added responsibilities, where staff felt overwhelmed and isolated by the complexity of new duties piled on top of old ones.

6.5. Insight 5: individual impact

This insight captures the personal experience of the change, ranging from job security fears and work overload (with lack of appreciation) to the realisation of how the acquisition affects long-term career stability.

6.6. Insight 6: skill frustration (with colleagues)

This insight explores the irritation arising from a lack of training and support, as well as the perceived decline in competence and productivity compared to past standards.

6.7. Insight 7: strategic goal conflict

This insight addresses the clash between the new organisation's strategic goals and the professional values, customer service standards, and personal goals of the staff.

6.8. Insight 8: social fragmentation

This insight reflects the breakdown of team spirit post-acquisition, marked by increased irritability, a decline in social cohesion, and a demand for more transparency

6.9. Insight 9: leadership distance

This insight represents the disconnect between top management and the front line, characterised by a lack of awareness regarding staff needs and a failure to follow up on employee well-being.

6.10. Insight 10: local leadership support

This insight highlights the positive, tactical role of immediate supervisors who attempted to cushion the blow through early warnings and collaborative problem-solving

Interview 7

7.1. Insight 1: organisational blindness

This insight identifies the failure of the organisation to plan for the human and logistical realities of a merger. It highlights a 'top-down' strategy that ignored ground-level complexity, leading to structural chaos and perceived leadership gaps.

7.2. Insight 2: identity erosion

This insight focuses on the individual's internal experience. It captures the transition from professional autonomy to a state of shock, trauma, and a loss of 'self' as roles are experienced to become ambiguous and less intellectually challenging.

7.3. Insight 3: cultural fragmentation

This insight focuses on the breakdown of trust and social cohesion. It shows the 'us vs. them' mentality between merging entities and the resulting silos that prevent knowledge sharing and social integration.

7.4. Insight 4: employee defensive adaptation

This insight describes how employees survived the merger by turning inward. It covers peer support used to bypass management, as well as the suppression of emotions to avoid corporate consequences.

7.5. Insight 5: organisational sustainability ethics

This insight deals with the moral obligations of the firm. It contrasts the organisation's focus on power with the employees' belief that ethical treatment of both staying and departing staff is essential for long-term health.

Interview 8

8.1. Insight 1: communication misalignment

This insight identifies the psychological gap caused by management's short comings in being transparent. It highlights the dissonance between corporate 'reassurance' and the reality that employees felt coming through personal channels.

8.2. Insight 2: systemic integration chaos

This theme focuses on the operational 'mess' of the merger. It describes a lack of structural alignment and perceived 'lack' in planning that left employees mentally, physically and technically unsupported during a period of extreme workload and unclarity.

8.3. Insight 3: leadership detachment

This insight addresses the 'human gap' at the top. It highlights a leadership layer that became invisible or passive, failing to check in on well-being or provide the necessary visibility to maintain engagement.

8.4. Insight 4: social and psychological withdrawal

This insight explores the defensive manoeuvres used by the collective team. As psychological safety became less and social silos formed, employees suppressed their concerns and withdrew socially to protect themselves.

8.5. Insight 5: transition to transactional culture

This insight identifies a fundamental shift in the organisation's values. It describes a move toward a high-pressure environment where corporate data and results-oriented have become increasingly important over local professional autonomy.

8.6. Insight 6: professional validation and drive

This insight highlights the positive growth and resilience emerging from the change. It captures the moments where expertise was recognised, job security remained firm, and individuals felt a renewed motivation to prove their value.

Interview 9

9.1. Insight 1: stuck in routine, less adaptable to change

This insight identifies the mental and emotional blockage caused by the sudden disruption of routine. It explores how shock, anxiety, and repetitive change create a state of internal fatigue that makes it difficult for employees to move forward.

9.2. Insight 2: personal identity loss

This insight captures the decline of the employee's sense of self and belonging. It highlights the shift from personal loyalty and individual security to a state of alienation within the new corporate structure.

9.3. Insight 3: silenced communication

This insight focuses on the failure of information exchange. It covers both the intentional suppression of speech due to fear and the unintentional barriers created by impersonal 'mass' messaging and language differences.

9.4. Insight 4: distant management

This insight addresses the widened gap between management and the workforce. It highlights the physical and emotional distance of executives, the barriers created by hierarchy, and the perceived loss of HR as a neutral advocate.

9.5. Insight 5: operational (support) neglect

This theme examines the 'lacks' of organisational support. It identifies the total absence of onboarding, training, and communicated strategic foresight that led to a perceived decoupling of the organisation's goals from its actual capacity.

9.6. Insight 6: unoPicial support

This insight highlights a resilient social response to the change. Employees retreated into informal 'trust circles' and internal networks to find the support and information that the formal organization failed to provide.

9.7. Insight 7: rebuilding trust and credibility

This insight looks at the active requirement for repairing the cultural damage. It identifies the specific need for leadership to move past contradictory promises and cultural stagnation to earn back employee trust.

9.8. Insight 8: importance of human-first focus

This insight goes more into depth, it advocates for a paradigm shift that prioritises human relationships and interdepartmental collaboration over purely technical performance metrics

Interview 10

10.1. Insight 1: emotional stress

This insight focuses on the heavy psychological impact of the merger, ranging from the initial shock and long-term uncertainty to the struggle of adapting to a new cultural identity.

10.2. Insight 2: leadership gap

This insight captures the disconnect between management and the workforce. It highlights a 'top-down' style that lacks transparency and relies on assumptions rather than clear, shared guidance.

10.3. Insight 3: practical chaos

This insight addresses the day-to-day operational struggles. It describes the frustration caused by poor timing, technical barriers, and a lack of support during the onboarding of new systems and staff.

10.4. Insight 4: strict hierarchy

This insight explores the impact of moving to a more rigid corporate structure. It focuses on the loss of organizational speed and the inability to solve problems creatively due to new rules.

10.5. Insight 5: wasted expertise (brain drain)

This insight identifies the 'brain drain' during the merger. It covers the struggle to respect, hold onto, or integrate the specialised skills and institutional memory of the original team.

10.6. Insight 6: feeling invisible

This insight highlights the staff's sense of feeling underrepresented. It captures the frustration of being excluded from leadership circles, having feedback ignored, and feeling like an 'afterthought' in the process.

10.7. Insight 7: human resilience

This insight represents the constructive side of the feedback. It shows how employees found their own support through trusted social circles and identified a clear need for a more empathetic, human-centered style of leadership moving forward.

Interview 11

11.1. Insight 1: broken trust

This insight focuses on the loss of faith in leadership. It describes how employees felt betrayed by false promises, historical baggage, and a lack of honesty from the executive level.

11.2. Insight 2: personal insecurity

This insight captures the internal psychological struggle of employees. It highlights the fear, anxiety, and mental effort required to process the potential loss of roles or the threat of failure in new ones.

11.3. Insight 3: operational chaos

This insight addresses the logistical and administrative failures of the merger. It covers lacking open communicated planning, financial waste, and the stagnation of work caused by a messy transition process.

11.4. Insight 4: workload pressure

This insight explores the physical and collaborative limits of the staff. It describes how the accumulation of multiple roles and heavy workloads prevented people from focusing on their core tasks or helping their teammates.

11.5. Insight 5: social integration

This insight highlights the human resilience and the 'glue' that held the team together. It shows how empathy, shared rituals, and social effort allowed for a successful integration despite initial resistance.

11.6. Insight 6: system rigidity

This insight identifies the negative shift toward a more formal and 'cold' organisational structure. It looks at the risks of losing institutional knowledge, high staff turnover, and the move toward silos.

Interview 12

12.1. Insight 1: lack of clear information

This insight is about management not sharing enough details. When information is vague or only goes one way, it creates a 'vacuum' where bad rumours grow because nobody knows the real reasons for decisions.

12.2. Insight 2: leadership ignoring work reality

This insight shows the gap between what management see in 'data' and what is actually happening on the floor. Leaders act like it is 'business as usual,' but they are ignoring the fact that workers are tired and the systems are not ready

12.3. Insight 3: organisational exclusion from strategy

This insight is about employees feeling like they have no power. They are not included in future plans, roadmaps, or decisions about who becomes a manager, making them feel like they are just watching the change happen to them

12.4. Insight 4: growth-driven work with little resources

This insight focuses on the stress of higher targets without the right help. Management wants more growth but refuses to/lacks to provide the training, staff, or tools needed to do the job well

12.5. Insight 5: perception of feedback being useless

This insight explains why workers stop trying to help. Because of the distance between levels of management, employees feel their feedback is ignored, which makes them stop trusting that bosses can solve problems.

12.6. Insight 6: loss of professional pride

This insight is about the personal cost of the merger. People feel 'invisible' or less important because the new system ignores their years of experience, feeling they are treated as a number

Interview 13

13.1. Insight 1: protecting personal identity

This insight focuses on the internal struggle of employees. It describes the mental effort needed to process change and the fear people have of losing their personal values or their professional 'self' during the merger.

13.2. Insight 2: distant leaders

This insight captures the gap between management and the floor. It highlights how leaders felt like an "exclusive club" that was too busy, too impersonal, or too high up in the hierarchy to actually guide or empathize with the staff.

13.3. Insight 3: broken trust

This insight addresses the damage done by management's words. It identifies how over-promising, inaccurate reassurances, and poorly timed updates destroyed the credibility of leaders and left employees feeling misled.

13.4. Insight 4: quiet resistance

This insight focuses on how employees pushed back in unofficial ways. This includes social rebellion, like refusing to attend events, hoarding knowledge as a defense, or staying silent because it no longer feels safe to speak.

13.5. Insight 5: culture clashes

This insight explores the friction between different ways of working. It covers the tension between old 'informal' styles and new 'professional' structures, as well as the problems caused by a lack of shared knowledge between the two companies.

13.6. Insight 6: team strength

This insight highlights the positive side of the workforce. It shows how the team used their shared 'family' values to stay together and how they used informal innovation to solve problems when the official systems failed.

Interview 14

14.1. Insight 1: the struggle to control the narrative

This insight captures the management's attempt to impose order on communication through strategies and playbooks, while simultaneously battling leaks, rumors, and the difficulty of satisfying a diverse workforce.

14.2. Insight 2: structure integration challenges

This insight highlights the specific operational gaps where the merger failed to support employees, specifically regarding onboarding, systems, and the disconnect between corporate frameworks and local reality.

14.3. Insight 3: resistance from the 'legacy' culture

This insight groups codes related to the friction between the old and new cultures, focusing on the negative behaviors and 'baggage' that management perceived in the existing staff.

14.4. Insight 4: disconnect between leaders and staP

This insight focuses on the physical and psychological distance between the workforce and the decision-makers, highlighting the reliance on middle management to bridge a gap.

14.5. Insight 5: balancing stability and evolution

This insight captures the complex timeline of the change, covering the initial relief and promises of security, with later on the inevitable need for the organisation (and individuals) to evolve and take risks.

Interview 15

15.1. Insight 1: broken trust and feeling of betrayal

This insight captures the deep sense of disappointment employees felt toward management. It highlights how improved transparency was needed, but instead, employees felt abandoned and misled.

15.2. Insight 2: the layer of past trauma (stories)

This insight shows that some employees were already 'damaged' before this specific change happened. Previous bad experiences made them tired, skeptical, and biased against the new acquisition.

15.3. Insight 3: the freeze on innovation

This insight focuses on how the uncertainty stopped work from moving forward. Instead of creating new things, people stopped taking risks and projects were (top-down) cancelled.

15.4. Insight 4: lack of formal guidance

This insight highlights the failure of the official company systems. Because there was no documentation, training, or clear communication, employees were left without a map.

15.5. Insight 5: 'surviving' through informal networks

This insight reveals a positive coping mechanism: because the formal systems failed/were lacking behind, employees relied on each other, the 'old guard,' and personal respect to keep things running.

15.6. Insight 6: loss of identity and belonging (+ (growth of?) chances)

This insight describes the confusion and separation employees felt. They didn't know their place in the new company, and specific groups felt pushed to the side. (However, over time some employees also saw the opportunities that were presented because of the change)

Appendix 8 - Consent Form Co-Creation

Consent Form – Co-creation session

Dear participant,

You are being invited to participate in a research study titled: *Building a cohesive corporate culture: a strategic design for the AAT Group*. This study is being done by Rosemarijn Broere from the TU Delft in collaboration with the AAT Group, previously known as the Skalar Group, and is part of a thesis project from the Master study Strategic Product Design from the faculty of Industrial Design Engineering.

The purpose of this research study is to gain insights on the group experiences of change, and brainstorm on what potentially could improve the current scenario and future change implementations. This co-creation session will take you approximately one to one and a half hours (1 – 1.5 hours) to complete. During this session you will be asked to, together with (3) other participants, provide input and think creatively in order to create something together. During the research, an written materials will be generated and notes will be taken to guarantee accuracy of the gathered insights. In addition, if upon agreed, photographs may be taken of the during the session for project documentation purposes.

All collected data will be used for a Master's graduation project at the TU Delft. The project outcomes include a final report, a presentation, and a final deliverable/document. The final report and deliverable will be made publicly available after the project is completed. The notes will be deleted no later than one month after the project's completion (by April 2026). By participating, you agree that the notes and anonymised photographs may be used within the context of this project.

Your participation in this study is entirely voluntarily, and **you may withdraw at any given time** without needing to provide a reason. You are free to skip any questions or decline to take part in certain activities, without any consequences.

If you have any questions about the study, this consent form, or if you have any comments or concerns, please contact:

PLEASE TICK THE APPROPRIATE BOXES	Yes	No
A: GENERAL AGREEMENT – RESEARCH GOALS, PARTICIPANT TASKS AND VOLUNTARY PARTICIPATION		
1. I have read and understood the study information, or it has been read to me. I have been able to ask questions about the co-creation session and my questions have been answered to my satisfaction.	<input type="checkbox"/>	<input type="checkbox"/>
2. I consent voluntarily to be a participant in this study and understand that I can refuse to answer questions, and I can withdraw from the study activities at any time, without having to give a reason.	<input type="checkbox"/>	<input type="checkbox"/>
3. I understand that taking part in the study involves: <ul style="list-style-type: none"> • That notes will be taken during this co-creation session. • The created materials within a month after completion of this research project will be deleted/destroyed. 	<input type="checkbox"/>	<input type="checkbox"/>
4. I agree that photographs may be taken (and anonymised) during the study and used for the purpose of documenting the research process and report.	<input type="checkbox"/>	<input type="checkbox"/>
B: POTENTIAL RISKS OF PARTICIPATING (INCLUDING DATA PROTECTION)		
5. I understand that my participation means that personally identifiable information and research data could be collected, and that there is a small risk I could be identified from this information.	<input type="checkbox"/>	<input type="checkbox"/>
6. I understand that the personal information collected about me, will not be used in the research report and will not be publicly available in the Delft repository after the publication date.	<input type="checkbox"/>	<input type="checkbox"/>
7. I understand that the personal information that could identify me, such as my full name and email address will not be shared outside the researcher.	<input type="checkbox"/>	<input type="checkbox"/>
8. I understand that the (identifiable) personal data I provide will be destroyed no later than the 6 th of April.	<input type="checkbox"/>	<input type="checkbox"/>
C: RESEARCH PUBLICATION, DISSEMINATION AND APPLICATION		
9. I understand that after the research study the de-identified insights I provide may be used in the publication of the graduation report, presentations, or any other final project deliverable. This information may also be shared with the AAT Group.	<input type="checkbox"/>	<input type="checkbox"/>
10. I agree that my responses, views or other input can be quoted anonymously in research outputs	<input type="checkbox"/>	<input type="checkbox"/>
11. I agree that my operational level (LT/MT/operational) could be used for quotes and insights in research outputs	<input type="checkbox"/>	<input type="checkbox"/>
D: (LONGTERM) DATA STORAGE, ACCESS AND REUSE		
16. I give permission for the de-identified data collected about me, such as co-creation notes, photographs, to be archived in the Education Repository so that it may be used for future research and educational purposes.	<input type="checkbox"/>	<input type="checkbox"/>

PLEASE TICK THE APPROPRIATE BOXES	Yes	No
17. I understand that access to the (anonymised) insights from the data will be publicly available to TU Delft students and staff, as well as employees from the AAT Group.	<input type="checkbox"/>	<input type="checkbox"/>

Signatures

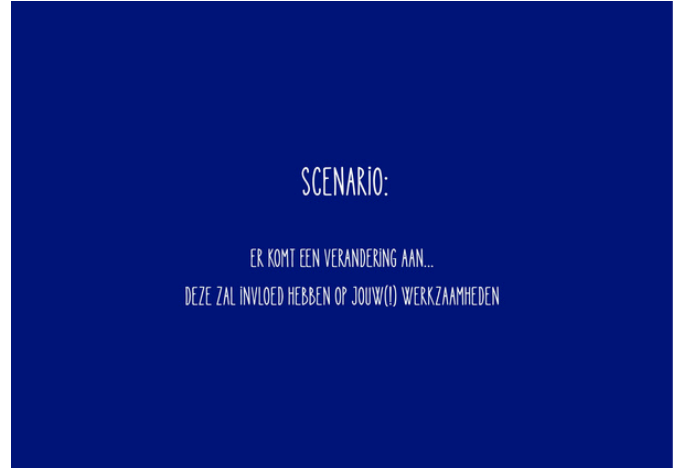
Name of participant Signature Date

I, as researcher, have accurately read out the information sheet to the potential participant and, to the best of my ability, ensured that the participant understands to what they are freely consenting.

Researcher name Signature Date

Study contact details for further information:

Appendix 9 - Co-Creation Materials



HET HEDEN: *Gezien jouw huidige ervaring, na een 'recente' verandering...
Als ik op dit moment iets zou kunnen veranderen zou dat ... zijn*

A large, empty white rectangular box with a thin grey border, intended for notes related to the 'HET HEDEN' prompt.

CONTEXT: *Bij een verandering kan een goede bond met je manager helpen...
Voor mij betekend een goede connectie met mijn manager...*

A large, empty white rectangular box with a thin grey border, intended for notes related to the 'CONTEXT' prompt.

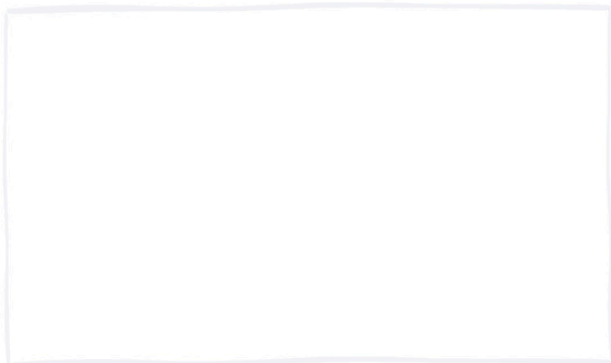
CONTEXT: *Als werknemer heb je inzichten en expertise...
Tijdens werkzaamheden merk ik dat mijn input gewaardeerd wordt als of wanneer...*

A large, empty white rectangular box with a thin grey border, intended for notes related to the 'CONTEXT' prompt.

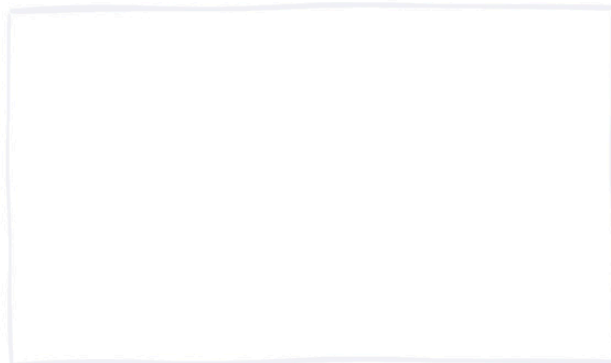
CONTEXT: *Als werknemer heb je inzichten en expertise...
Tijdens werkzaamheden merk ik dat mijn input gewaardeerd wordt als of wanneer...*

A large, empty white rectangular box with a thin grey border, intended for notes related to the 'CONTEXT' prompt.

CONTEXT: *Er komt een verandering aan...*
Voor deze verandering heb ik behoefte aan support en inzichten betreffend...



CONTEXT: *Als manager heb je inzichten en expertise...*
Tijdens werkzaamheden merk ik dat mijn input gewaardeerd wordt als of wanneer...



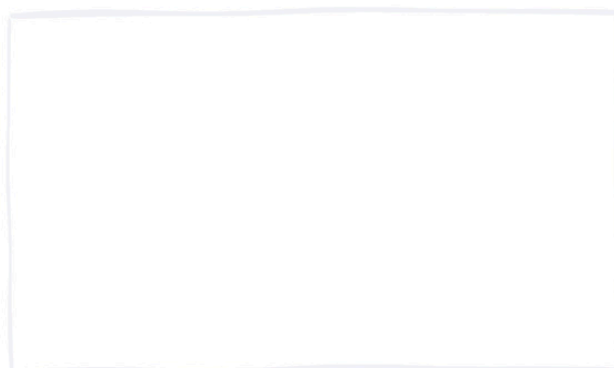
CONTEXT: *Zo'n verandering brengt natuurlijk veel gedachten met zich mee...*
Ik zou deze ideeën graag willen kunnen delen...

<i>Door middel van...</i>	<i>Met...</i>
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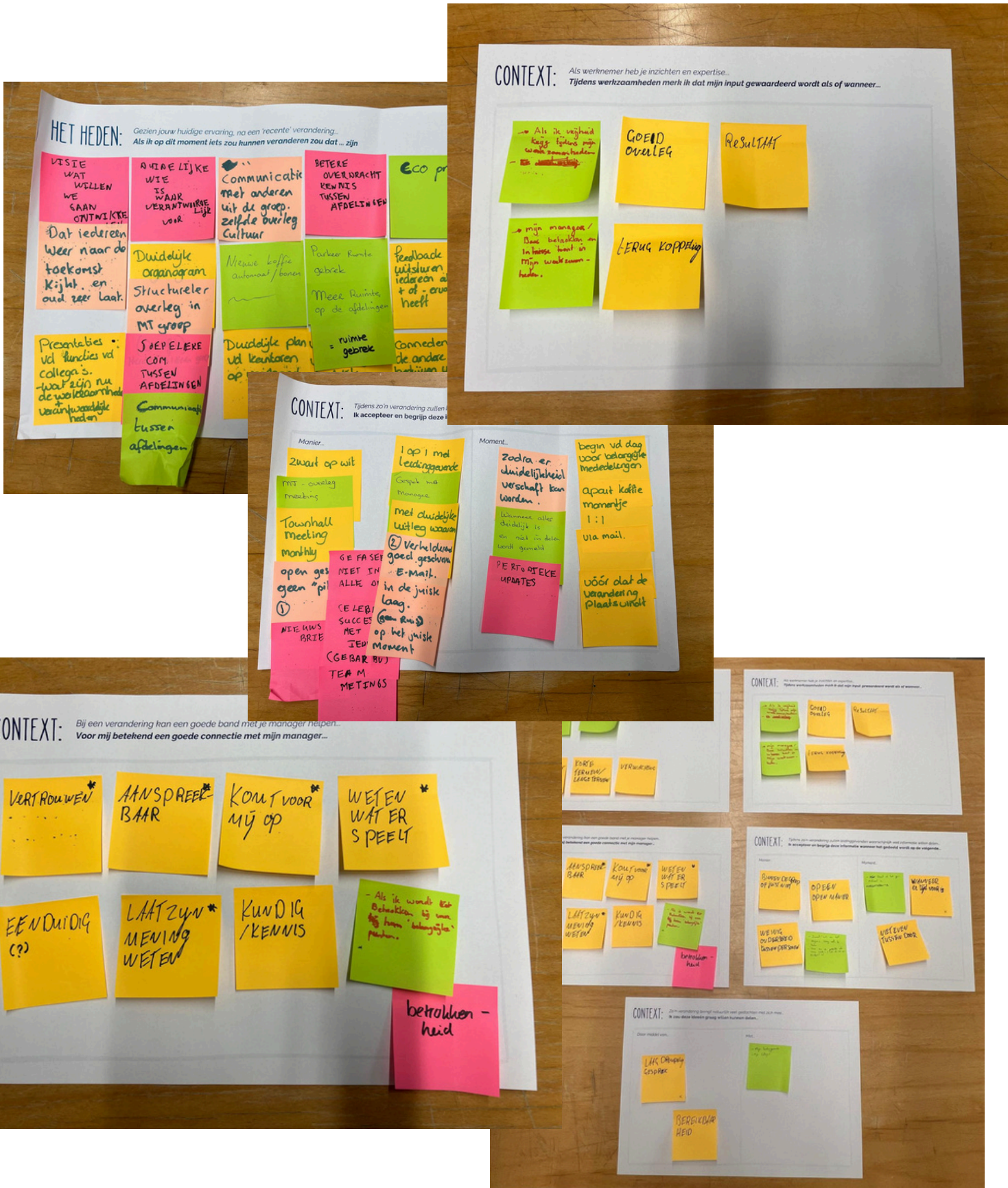
CONTEXT: *Tijdens zo'n verandering zullen leidinggevenden waarschijnlijk veel informatie willen delen...*
Ik accepteer en begrijp deze informatie wanneer het gedeeld wordt op de volgende...

<i>Manier...</i>	<i>Moment...</i>
------------------	------------------

CONTEXT:



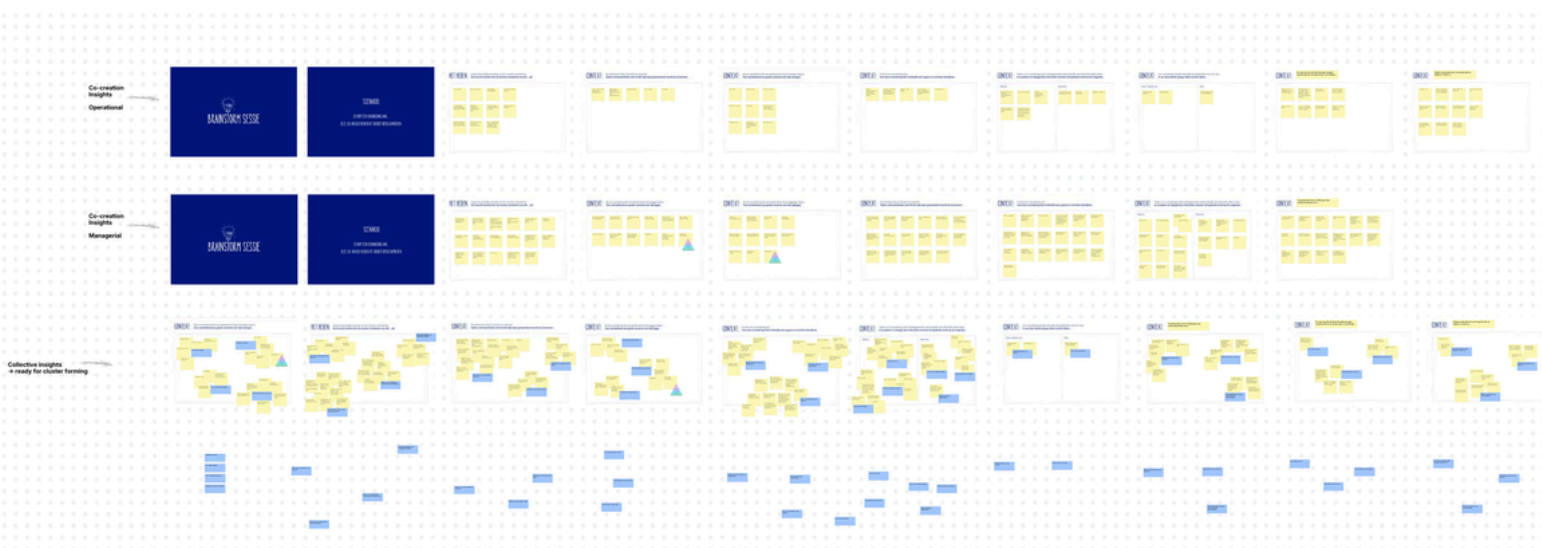
Note: due to sensitivity of the topic, these pictures were only added to gain insights on what the co-creation sessions' output looked like.



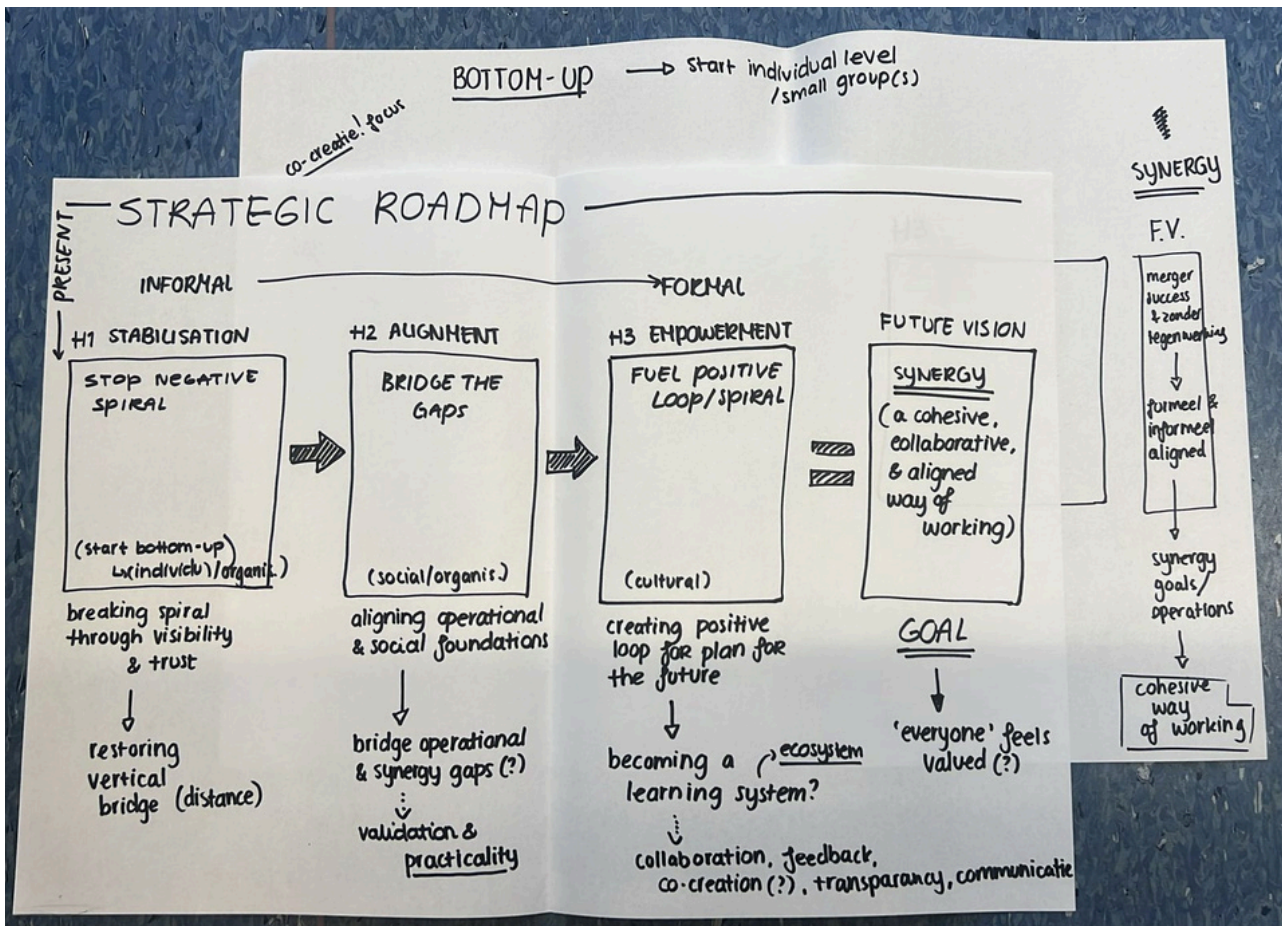
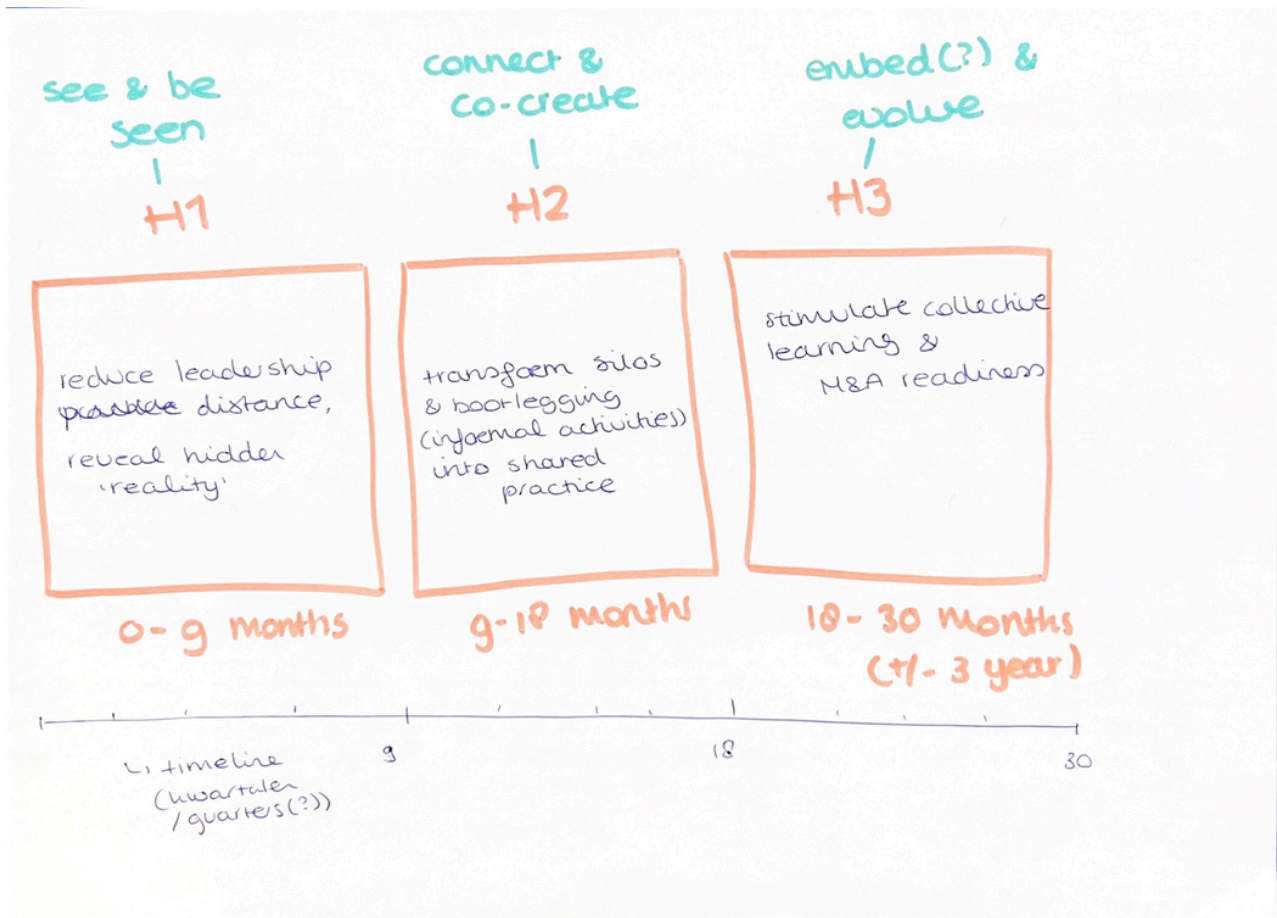
Appendix 10 - Co-Creation Data Synthesis

Note: due to requested anonymity of the topic, a picture is added to understand the principle of the co-creation filtering.

1. All data was digitalised
2. Data was coded (Thematic Analysis)
3. Comments on same questions were put together
4. Themes were found, reviewed and named
5. Final conclusions were drawn (blue boxes)



Appendix 11 - Roadmapping Brainstorm



FUTURE VISION

CHANGE : a company that... (??)

From hidden survival to visible organisational learning

- visible leadership connectivity
- psychological safety & voice
- (cross-functional) collaboration & shared identity
- 'captured' informal activities/practices stimulating continuous improvements.

H1 (FOUNDATION) stabilisation & trust restoration

(now → 3/6 months)

- ↑ stabilization
- stopping psychological breach (/broken trust)
- closing distance between top management (& group) & workforce
- ↓
- address visibility gap & chronic uncertainty (=priority 1 issues!!)

(side note) → also shows from the employee engagement survey!!

goals

- bridge credibility gap through transparent, 2-way communication
- re-establish psychological safety to reduce fear of speaking up
 - ↳ /neutralise
- cancel the gossip economy by replacing rumours with honest guidance
 - (shared) ↳ on updates on merger's progress & remaining/occurring challenges

what is needed?

- leadership presence (mandatory 'floor' time for (top) management to engage in dialogic communication)
- truth-teller channels (a team?) (group of people?)
 - town halls & feedback loops that allow honest critique without fear of consequences.
 - topic of the week? → provide input! (safety valve protocol) ↳ acknowledge!

(thought → department update(s)?)
↳ must show/c'd start small?

H2. integration: ^{optimisation(?)} operational alignment & legacy validation

(6 months -> 1 year)

- > once trust = established
 - ↳ tackles operational response chain reaction
- > validating legacy capital -> to prevent identity erosion (& mitigating workload stress factors that trigger defensive bootlegging)
- > tackling operational regression by acknowledging (legacy) expertise to optimise new systems. This H. acknowledges the culture within the capital
 - ↳ use legacy knowledge to fix new ways so they actually work for the future.

GOALS

- validate workforce professional identity by acknowledging (legacy) achievements
 - ↳ co-creation/ stakeholder implementation/ validation
- identify operational practicality gaps -> new systems clash
 - ↳ how are we actually getting things done?
- mitigate workload intensification
 - ↳ streamlining new ways using legacy shortcuts (bootlegging before)
 - ↳ expertise(s)

WHAT IS NEEDED?

- > socio cultural audits?
 - working groups (legacy experts) & new experts audit current systems -> create improved, documented version. (standard operating procedure)
- > resource realignment.
 - using ground-level data to see & understand what is achievable -> implement stakeholders within this process?

STAKEHOLDER MAP.
include who = impacted!!

H3. growth: capturing SYNERGY & INNOVATION

(10-18 months??)

moving from survival to sustainable growth.
This phase = about creating a (new) culture where the workforce proactively improves the new systems rather than bypassing them.

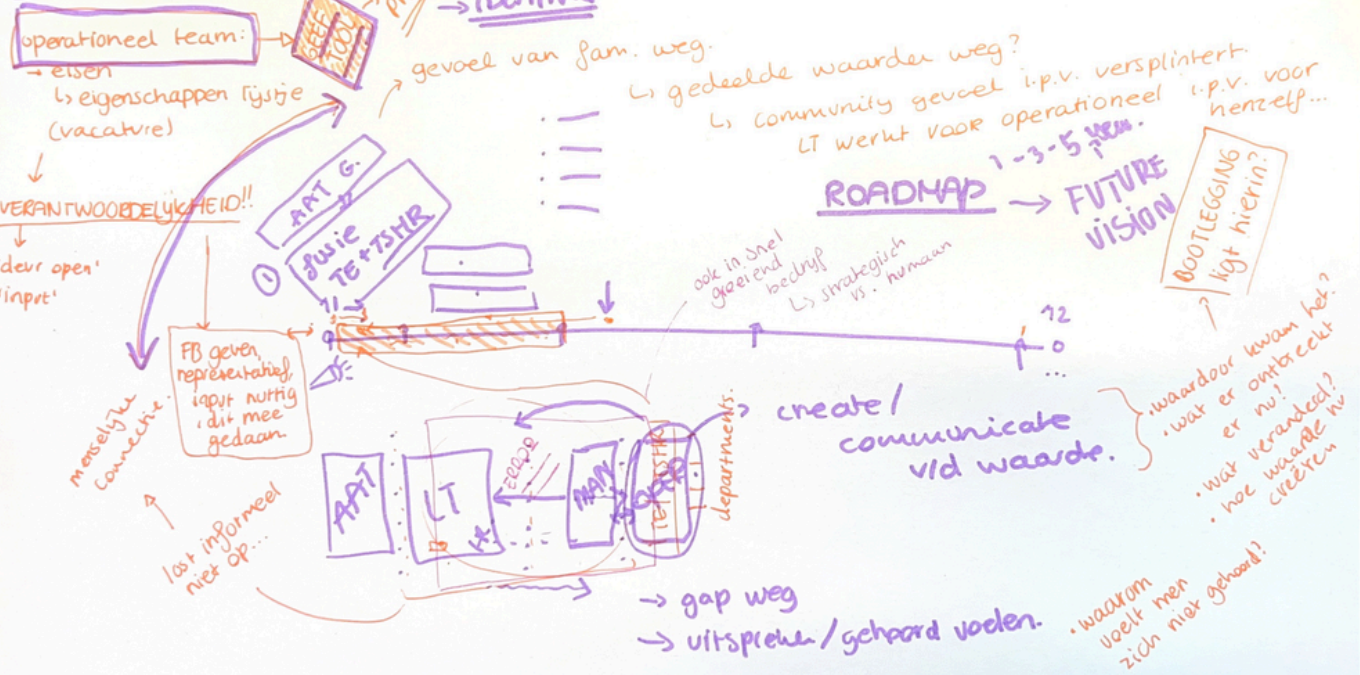
GOALS

- formalise adaptive feedback loop to capture 'organic' bootlegging & formalise / scale them.
 - ↳ breakthrough
- dissolve us. vs. them (fragmentation) through (performance?)
- cultural sustainability
 - ↳ workforce helped build it (new identity)

WHAT IS NEEDED?

- > synergy lab??
- formal corporate thing that tests, reviews, & implements floor-level innovations into official strategy
- > strategic storytelling (united)
- internal brand re-launch -> focuses on the future entity as synthesis of its heritage(s), validating culture within operational.

② TOOL / TEAM.



- bestaande banden gebruiken?
- metaforen → niet gehoord voelen → hoe mee dealen? HKJ mensen gehoord voelen?
- gedrags verandering .. → dinget meenemen? → gemeente? wat werkte? wat niet?

Appendix 12 - Note on AI usage

Note on the usage of Artificial Intelligence

Generative AI was used in this project as a supportive tool to improve and brainstorm on ideas, improve writing, and reflect on the structure and complexities of this research, not as a replacement for any academic work. In the early phases, ChatGPT was used for initial brainstorming on possible research directions and for testing different ways of formulating concepts. Grammarly as well as ChatGPT were later used for language-related support, including spelling and grammar checks, polishing formulations, and clarifying complex sentences from the literature. During the literature review, Notebook LM was used to navigate academic texts and to stimulate discussion and reflection on the research topics. Towards the end of this research, Perplexity was used to think along about the overall structure of the document and to highlight potential inconsistencies in argumentation or terminology. The reviews, research design, analysis, the interpretation of the findings, corresponding argumentations, and the development of the framework, co-creation approach, and roadmaps are the exclusive intellectual work and responsibility of the author.

MASTER THESIS

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