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The process of social alignment and misalignment within a complex IT project

Alicia Gilchrist [a,*], Andrew Burton-Jones [b], Peter Green [a]

[a] Queensland University of Technology, Room 209, Level 3, B Block, Brisbane, QLD 4001, Australia
[b] University of Queensland, Room 531, Joyce Ackroyd Building, St. Lucia Campus, Brisbane, QLD 4072, Australia

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Abstract

Project management is more efficient and effective when project stakeholders are socially aligned on what the project objectives are and how they should be achieved. This outcome occurs because social alignment reduces the friction amongst stakeholders each time a project management decision is made. Yet, how social alignment develops or dissolves over time in a complex project is unknown. This research develops a dynamic model of social alignment and misalignment, and it identifies some of the project controls that appear to affect their development. Drawing on interview and observational data from 17 respondents involved in a complex health-IT project over a two-year period, we show that social alignment and misalignment involve eight stages – separation, disrespect, lack of cross-discipline participation and social misalignment through to learning, respect, cross-discipline participation and ultimately, social alignment. The research has implications for how researchers theorize social alignment in complex projects and how practitioners can facilitate its development.

Keywords: Social Alignment; Project Management; IT Project; Stakeholders; Project Stakeholders

1. Introduction

When project stakeholders share understanding of a business outcome, and they are committed to both the outcome and the means of achieving it, they are viewed as being "socially aligned" (Reich and Benbasat, 2000). Project stakeholders are "individuals or groups who have an interest or some aspect of rights or ownership in the project, and can contribute to, or be impacted by, the outcomes of the project" (Bourne, 2006, p.5). As a result, project progress, and ultimately success, is much harder to achieve without agreement between the project stakeholders as to what exactly needs to be accomplished and how best to accomplish it (O'Leary and Williams, 2013; van der Hoorn and Whitty, 2017). While the benefits of socially aligning the project stakeholders are well-known (Bygballe et al., 2016; Cicmil and Marshall, 2005; Ika and Donnelly, 2017; Mok et al., 2015; Ravishankar et al., 2011; Tantalo and Priem, 2016), how exactly the social alignment process unfolds has not yet been fully understood. The stages stakeholders transition through as they move towards alignment are unknown. It is likely that the tendency to view alignment as an end-state rather than a process is one of the reasons why research has not delved into this area further. In line with recent calls (e.g., Karpovski and Galliers, 2015), our aim is to overcome this problem by conducting a longitudinal, qualitative case study to explore how social alignment develops in complex IT projects.

Over a two-year period, we studied the implementation of a large, complex information technology project in the health industry. As our study evolved, our data challenged our original objectives because we found that social alignment was not just a simple, linear process of aligning, but rather part of a larger cycle involving linked processes of both alignment and misalignment. Motivated by this observation, we adjusted our objective and sought to answer the following research question: (1) How do the processes of social alignment and misalignment develop over time

* Corresponding author.
E-mail address: aliciakgilchrist@gmail.com. (A. Gilchrist).

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in complex IT projects? To provide more insights for practice, we also sought to address a secondary question: (2) Which project controls facilitate or hinder social alignment? Our interest in project controls stems from the link between group or clan development and project controls. We discuss this link in our review of the literature. Overall, by answering these questions, the paper intends to contribute by providing researchers and practitioners with a finer-grained and more complete perspective on social alignment, social misalignment, and how they evolve, than available in the literature to date.

The remainder of the paper is structured as follows. The next section discusses the literature that we drew upon to examine social alignment and project controls. We then detail our research methods. Next, we present our findings along with a model of social alignment and misalignment, which we derived from our findings. Finally, we close the paper with a discussion of our research findings, implications of our findings for theory and practice, and a conclusion.

2. Developing an understanding of the process of social alignment

Although the concept of social alignment, as studied here, originates from the Information Systems field (Reich and Benbasat, 2000), the benefits of aligning project stakeholders are known across the Information Systems (Ravishankar et al., 2011), Stakeholder (Mok et al., 2015), general management (Tantalo and Priem, 2016), Construction (Cicmil and Marshall, 2005) and Project Management literatures (Bygballe et al., 2016; Ika and Donnelly, 2017). Each field has taken a different view of social alignment. This paper links the Information Systems and Project Management views.

2.1. Social alignment and the Information Systems literature

Social alignment has been found to operate as an important precursor to business-IT alignment (Ravishankar et al., 2011; Walentowitz and Beimborn, 2011). Rahimi et al. (2016, p. 145) define business-IT alignment as the "process of achieving competitive advantage by developing and sustaining a symbiotic relationship between business and IT". As business-IT alignment is critical for organizational performance (Chan and Reich, 2007; Gerow et al., 2015; Wagner et al., 2014; Walter et al., 2013), sustained alignment remains highly desired (Avison et al., 2004; Wagner et al., 2014; Vessey and Ward, 2013). As such, research exploring how and why it occurs is much needed (El-Masri et al., 2015; Gerow et al., 2015). Research on the *process* of achieving business-IT alignment remains particularly scarce and critical (El-Masri et al., 2015; Karpovski and Galliers, 2015).

Evidence of the link between social alignment and business-IT alignment has been provided by Preston and Karahanna (2009), who found an association between shared understanding and IS strategic alignment, and Karahanna and Preston (2013), who found a link between cognitive social capital (consisting of shared language and cognition) and IS strategic alignment. In addition, drawing on social capital theory, Schlosser et al. (2015) found an association between social alignment and business performance. A literature review by Walentowitz and Beimborn (2011) of articles that discuss alignment in high ranking IS journals between 1/2000–8/2011 further supports the link between social alignment and business-IT alignment. They found one third of those articles viewed aspects of social structure between business and IT employees as antecedents of business-IT alignment. Moreover, Ravishankar et al. (2011) note that the most salient antecedents of business-IT alignment are shared domain knowledge and senior executive support for IS strategies.

Despite all this research, we could not find detailed studies on the process of social alignment because researchers have tended to focus on the strategic, intellectual and structural dimensions of alignment instead (Ravishankar et al., 2011), and because prior literature has tended to view alignment as an end-state rather than a process (Karpovski and Galliers, 2015). The desired end-state can perhaps best be described as a "fusion" between business and IT, where there is no distinction between the two groups (Bharadwaj et al., 2013). Furthermore, to the best of our knowledge, only one social alignment study by Reich and Benbasat (2000) has used qualitative methods. Given the infancy of the construct, qualitative studies would be particularly beneficial in enabling researchers to gain insight into the social alignment process, what exactly constitutes it, and how it can be achieved.

Given the lack of research on the process of developing social alignment, we expanded our literature search to include studies of themes considered to be dimensions of alignment (even if they did not study alignment per se). Specifically, shared domain knowledge and mutual support/commitment are often considered elements of social alignment (Ravishankar et al., 2011; Walentowitz and Beimborn, 2011), so we searched for studies of these dimensions accordingly. The study by Martinho et al. (2016) is particularly useful because it indicates the drivers of shared domain, knowledge, and commitment. That study found that cross-discipline competence, cross-discipline participation and trust lead to shared understanding and commitment between business and IT executives. Thus, to understand the process of social alignment, the literature suggests that it may be useful to consider these factors (competence, participation, and trust). We refer to these factors later.

2.2. Social alignment and the Project Management literature

Large, complex IT projects involve multiple groups of stakeholders. Freeman (1984) broadly defines a stakeholder as any individual who can influence or be affected by an organization's objectives. The importance of effectively managing all project stakeholders is clear from the project management literature (Mok et al., 2015; Tantalo and Priem, 2016). To facilitate project success, the stakeholders' views on the project mission, success criteria, and plans should be brought into alignment (Bygballe et al., 2016; O'Leary and Williams, 2013). Hartman and Ashrafi (2002) cited a lack of stakeholder alignment around performance and control metrics as one of the main reasons for IT/IS project failure. Although the Project Management literature has not examined social alignment per se, similar themes have been discussed such as shared understanding (Awati, 2011; Chang et al., 2013), alignment (Hartman and Ashrafi, 2002; Ika and Donnelly,