Chapter XIII

The Role of the Organizational Context in the Use of a Workflow System: Lessons from a Case Study

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ABSTRACT

This chapter discusses the role of the organizational context in the use of a workflow system. It argues there are organizational factors such as structure, power, people, technology and culture, that constrain and enable the use of workflow systems. The author hopes that, by presenting a case study of a Portuguese organization, which implemented and used a workflow system, it will help to identify those organizational factors, which could affect implementation, and to understand how they can influence the success, or failure, of such a system. Finally, the results will contribute to a better management of the process of change.

INTRODUCTION

The macroeconomic environment, where organisations actually operate, can be characterized by several changes. We witness the globalisation of markets, the disappearance of geographic borders and an increase in commercial exchanges (Quinn, Baruch & Zein, 2002). To cope with these changes, challenges and opportunities, organisations are adopting new models of social organisation, oriented towards work teams, with a flatter hierarchical structure, where information is playing an important and decisive role in the competitiveness of the organisation.

The adoption of such changes is accompanied by the implementation of new information technologies (IT) that allow them to process the necessary information with speed and accuracy. Included in these IT solutions are workflow systems (WS). These systems are defined as proactive computer systems, which manage the flow of work among participants, according to a defined procedure consisting of a number of tasks. They co-ordinate user and system participants, together with the appropriate data resources, to achieve defined objectives by set deadlines (Hales & Lavery, 1991). The focus of these systems is on the way work usually flows, i.e., on the process, and not on the information contained in the support documents. These systems present themselves as one solution able to improve the efficiency and management of organizational processes. They provide communication tools, allowing collaboration, information and knowledge sharing and coordination of work. They also support organizational processes and work teams, providing tools to facilitate informal communication, automation and reduce the time taken to complete the task, allowing the realisation of work in a more efficient, effective and creative manner (Jablonski, 1996; Khoshafian, 1995).

Based on Systems Theory (Bertalanffy, 1940), an organisation and its environment can be considered as an open and dynamic system of complex, interrelating and interdependent parts. It is the relationships and the processes that make up the organizational context, rather than the separate entities or the sum of the parts. This means that a change occurring in one part of the system implies changes in all the others, including the environment.

Besides, the adoption of any technology always means change. According to Laudon and Laudon (1998), "information systems (IS) and organisations have a mutual influence on each other. (…) IS affect organisations and organisations, necessarily, affect the design of systems" (p. 75). Thus, the adoption of an IS is mediated by factors that "influence the interaction between IT and organisation" (p. 75).

As WS is a recent technology[1], the organizational impacts are not yet very clear (Boersma, 1994; Holm & Hedman, 1997; Kueng, 1998; Ljungberg, 1997). Besides, the research about these systems has focused on the phase of its development and implementation, forgetting its organizational impact. Also, care has been taken to address the technological issues of the system neglecting the characteristics of the organization where it has been implemented and the users that will work with it. Yet,

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