OPEN ACCESS
Jurnal Ilmiah Ilmu Terapan Universitas Jambi
Vol. 10 No. 4. August 2026, pp. 2093-2117 DOI. 10.22437/jiituj.v10i4.58244
Research Article

WHEN TRUSTED PEOPLE COME FIRST: PATRON–CLIENT THEORY AND LEGACY COORDINATION IN ROUTINE ITSM USE

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Article Info
Received: Jul 04, 2026
Revised: Jul 30, 2026
Accepted: Aug 22, 2026
OnlineVersion: Aug 31, 2026

Abstract
The formal installation of an IT service management (ITSM) helpdesk does not guarantee routine operational use. This study explains how pre-existing coordination practices shaped helpdesk use and how reported client expectations and consultant advice were translated within a Jakarta-based B2B distributor. A retrospective qualitative case study used 12 interviews, approximately 30 hours of observation, and helpdesk logs from Q2 2022 to July 2025. The analysis distinguished formal adoption from routine use and legacy informal coordination from post-implementation workarounds. Trusted-person contact, WhatsApp, and shared spreadsheets predated the helpdesk and continued to handle routine incidents after its implementation. Recorded ticket activity declined after the early period and appeared episodically near reported audits and consultant visits, although timing did not establish causation. Reported external inputs contributed to acquisition, configuration, training, and audit-facing records but were not translated into a consistently reinforced rule for routine use. Relational evidence showed unequal access or authority, repeated reliance, durability, and an effect on helpdesk use; because reciprocal benefit or felt obligation remained incomplete, the pattern was classified as a trusted-person relational pathway with partial patron–client-like features, not a patron–client-like relation. The findings explain how a pre-existing informal order can sustain an adoption–use gap and support a preliminary three-dimensional diagnostic lens. Managers, vendors, and consultants should map incident routes and informal tools before configuration, define escalation and backup roles, connect informal channels to the formal workflow, and reinforce routine use. The single case offers analytical transferability rather than statistical generalization; the lens requires prospective multi-case testing.

Keywords: IT Service Management, Informal Workarounds, Institutional Decoupling, Legacy Informal Coordination, Patron–Client Theory

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INTRODUCTION

ITSM is meant to make IT service work more orderly. People know who is responsible, what steps should be followed, and what records can be checked later. But buying a helpdesk and configuring it is not the same as changing how employees report problems. The system can be installed, active, and paid for, but still not become the normal route in daily work. What matters is not only the platform. The organization has to be ready. Managers have to support the process. Users need to be involved. The workflow also has to fit how work actually moves inside the company (Iden & Eikebrokk, 2013; Serrano et al., 2021; Alvarez & Linares, 2026). The same issue appears in digital transformation studies. Introducing technology is one thing. Changing the organization is another. Real transformation depends on the setting, the people, the process, and how the new way of working slowly becomes part of daily routines (Hanelt et al., 2021; Wessel et al., 2021; Kraus et al., 2022; Reis & Melão, 2023; Mühlburger & Krumay, 2024). A formally implemented helpdesk can therefore coexist with low routine use, leaving incident assignment, follow-up, and service review distributed across formal and informal channels. The urgent operational and research problem is not simply whether the platform exists, but whether it becomes the normal and traceable route for operational support.

This point becomes more serious in smaller firms. Frameworks made for more formal organizations cannot always be copied as they are. They have to fit what the firm actually has: the skills of its people, the way decisions are made, and the routines that are already used every day (Lema et al., 2015; Mandviwalla & Flanagan, 2021; Soluk & Kammerlander, 2021; Annosi et al., 2023; Omrani et al., 2024). Indonesian studies say almost the same thing. SME digital transformation and ITSM implementation depend on readiness, capability, and fit with existing work practices (Hayadi et al., 2021; Anatan & Nur, 2023; Lutfiani et al., 2025). So the practical risk is clear. A company may spend money on a formal service-management channel, but still fail to see what is really happening in daily operations. Incidents and requests may keep moving through other routes. Readiness and framework-fit explanations, however, do not fully explain how an informal coordination order that predates the platform shapes its subsequent routinization.

The first research gap concerns the distinction between formal organizational adoption and routine operational use. Existing ITSM research has provided valuable explanations based on training, technical capabilities, organizational culture, readiness, and management support (Iden & Eikebrokk, 2013; Serrano et al., 2021; Alvarez & Linares, 2026). However, these explanations can blur two analytically different outcomes. In this study, formal adoption denotes the organizational decision, acquisition, and implementation of an ITSM-enabled helpdesk, whereas routine operational use denotes its recurring use as the normal channel for actual incident and service-request handling. Research on information-system continuance, habit, and trust demonstrates that post-introduction behavior has determinants that cannot be reduced to the initial adoption decision (Jeyaraj, 2022; A. Mishra et al., 2023; Müller et al., 2024). Users also interpret implemented systems through their organizational setting, meaning that nonuse cannot automatically be treated as resistance (Jensen et al., 2009). The first gap is therefore the absence of a sufficiently mechanism-based explanation of why a formally adopted ITSM-enabled helpdesk does, or does not, become routinely used.

The second gap concerns the temporal status of informal practices. Research on workarounds, feral systems, shadow IT, and business-managed IT shows that users may maintain local performance, autonomy, and responsiveness through arrangements outside formally governed systems, while potentially introducing control, integration, and security risks (Azad & King, 2008, 2012; Alter, 2014; Davison & Ou, 2018; Mallmann et al., 2018; Klotz et al., 2022; Scalabrin Bianchi et al., 2022; White, 2023; Haag et al., 2024; Nguyen, 2024; Orr et al., 2024). However, a practice that existed before the ITSM system cannot initially be classified as a workaround to that system. Direct contact through trusted people and pre-existing WhatsApp- and spreadsheet-based coordination are therefore termed legacy informal coordination practices in this study. The term workaround is reserved for post-implementation instances in which actors pragmatically or deliberately bypass an available formal workflow. What remains underexplained is how such legacy informal practices condition the transition from formal adoption to routine operational use.

The relational dimension of this gap requires careful classification. Patron–client theory distinguishes durable, asymmetric, and reciprocal relations from ordinary trusted contact and is therefore used here as a sensitizing lens rather than a predetermined conclusion (Scott, 1972; Eisenstadt & Roniger, 1984). Trusted contact, rapid response, responsibility, expertise, proximity, urgency, or convenience

alone were classified as trusted-person routing. A patron–client-like interpretation required unequal access or authority, repeated reliance, durability, reciprocal practical benefit or felt obligation, and a demonstrable effect on formal helpdesk use (Irawan, 2017; Lukiyanto et al., 2018; Aida et al., 2020; Adisel et al., 2023). Where reciprocal benefit or obligation was not established, the pattern was classified more narrowly as a trusted-person relational pathway. The study therefore does not use a patron–client-like or full patron–client relationship as a predetermined empirical classification.

External expectations add an institutional dimension to the same problem. Institutional theory helps explain why a company may adopt a formal system even before the system really fits daily work. Sometimes the push comes from dependence on clients. Sometimes from professional norms. Sometimes from consultants who say, "this is the proper way" (DiMaggio & Powell, 1983). Recent studies also show the same pattern in digital transformation. Pressure can make organizations adopt technology, but adoption and real implementation are still two different things (Kuo et al., 2022; Chen et al., 2024). A formal structure can exist on paper, but daily work can still move somewhere else. This is the problem of decoupling (Meyer & Rowan, 1977). It becomes stronger when the organization is pulled by different work logics at the same time, then mixes formal and informal practices depending on what feels useful (Pache & Santos, 2013; Besharov & Smith, 2014; Woldeyohannes et al., 2023; Xiao et al., 2025). The open issue is not simply whether clients, consultants, or managers can push a company to install a helpdesk. They can. The harder question is whether that pressure can change daily helpdesk use when employees already have informal routes that still work. This study therefore does not pre-classify client influence as coercive pressure, consultant advice as understood within the organization as normative pressure, or nonuse as ceremonial compliance. Coercive pressure requires evidence of dependence and credible consequences; normative pressure requires evidence of professional authority or norm diffusion; and decoupling requires a patterned separation between formal presentation and routine work.

The study examines an anonymized Jakarta-based B2B distributor with an estimated workforce of 83–100 employees, where an ITSM-enabled helpdesk had been formally available for approximately three years. The case was selected because formal helpdesk availability coexisted with trusted-person escalation, WhatsApp-based reporting, and spreadsheet-supported coordination. The analysis reconstructs practices before and after implementation; distinguishes formal adoption, routine operational use, legacy informal coordination, and post-implementation workarounds; examines relational, workflow, and managerial explanations; traces the internal translation of reported external expectations; and compares interviews, workplace observations, and helpdesk logs. The resulting explanation informs bounded problem-solving implications without claiming that the study tested an intervention.

The objective of this study is to explain how established relational and digital coordination practices shaped the routine operational use of an ITSM-enabled helpdesk, and how the focal organization understood and acted on reported client expectations and consultant advice through its internal management practices. The study addresses two research questions: RQ1: How did trusted-person escalation and legacy WhatsApp- and spreadsheet-based coordination shape the routine operational use of the ITSM-enabled helpdesk? RQ2: How did the organization interpret reported client expectations and consultant advice, and what role did internal management practices play in formal adoption and day-to-day helpdesk use?.

The study makes three bounded contributions. First, it distinguishes legacy informal coordination that predates a formal platform from workarounds that arise when established routes bypass an available formal workflow after implementation. Second, it develops a cross-level explanation linking trusted-person routing, legacy informal coordination, the internal translation of reported external expectations, and sustained management reinforcement to the gap between formal adoption and routine operational use, while retaining workflow fit, usability, training, expertise, proximity, urgency, and convenience as contributing explanations. Third, it synthesizes the case into a preliminary diagnostic lens comprising the strength of trusted-person routing, the development of legacy informal coordination, and the weakness of sustained management reinforcement for routine helpdesk use. Only the configuration closest to the focal case was empirically observed; the remaining anchors and configurations are propositions for future testing. The novelty lies in explaining how a pre-existing informal order conditions the transition from formal adoption to routine use and in defining the empirical boundary of a patron–client interpretation, not in claiming the first discovery of workarounds or patron–client relations. The study seeks analytical transferability rather than statistical generalization (Walsham, 2006; Yin, 2013).

RESEARCH METHOD

This study used a qualitative case study approach. It examined organizational practices surrounding IT incident and service-request handling in one Jakarta-based B2B distributor where an ITSM-enabled helpdesk had been formally available for approximately three years. The purpose was not to estimate how common the observed pattern was across firms, but to explain how incidents and requests moved through formal and informal routes over time. A single-case design was appropriate because the sequence of implementation, work practices, organizational context, and the meanings attached to those practices could not be separated from the setting in which they occurred (Walsham, 2006; Yin, 2013; Mtisi, 2022). The unit of analysis was the organization's incident-routing and coordination practice, rather than an individual employee or the helpdesk platform as a technical product.

Formal adoption and routine operational use were treated as different conditions. Formal adoption referred to the company's decision to acquire, configure, and officially introduce the ITSM-enabled helpdesk. Routine operational use referred to the recurring use of that helpdesk as the normal route for actual incidents and service requests. A system could therefore be formally adopted without becoming embedded in daily work. Tickets created only near an audit or consultant visit were not automatically treated as routine use, particularly when the underlying issue had already occurred or had been handled through another channel.

The case was selected through criterion-based purposive selection. The anonymized company had an estimated workforce of 83–100 employees and met three criteria: the helpdesk had been introduced approximately three years before fieldwork; preliminary access discussions indicated that formal and informal work routes appeared to coexist; and the company permitted access to several organizational groups, ordinary work settings, and available helpdesk records. Access was obtained through the lead researcher's personal network, but neither researcher had worked for the company or acted as its consultant or adviser. The two research questions stated in the Introduction guided sampling, instrument development, data collection, and analysis.

Informants were selected through maximum-variation purposive sampling. They were included because they knew at least one important part of the case. Some were involved in the adoption decision. Some managed or provided IT support. Others reported IT problems, coordinated work across divisions, used the helpdesk, or chose other channels instead. The study did not rely only on the IT team, because that would make the case too narrow. Informants were therefore taken from management, IT, sales and marketing, warehouse and logistics, finance and administration, purchasing, and human resources and general affairs. In total, 12 informants took part in the study. Their composition is shown in Table 1.

Table 1. Informant Composition and Reporting Codes

Informant code(s)	Organizational group	Number of informants	Main perspective represented
I-01	Management	1	Adoption decision and organizational direction
I-02–I-03	IT	2	Helpdesk administration and operational IT support
I-04–I-05	Sales and marketing	2	User-side incident reporting and daily coordination
I-06–I-07	Warehouse and logistics	2	Operational and field-level incident reporting and response
I-08–I-09	Finance and administration	2	Administrative system use and shared work records
I-10–I-11	Purchasing	2	Cross-division requests and coordination
I-12	Human resources and general affairs	1	Employee orientation and organizational work routines
Total	Seven organizational groups	12	—

As Table 1 indicates, the sample spans seven organizational groups and includes both adoption-side and user-side perspectives. Informant codes link quotations to the dataset. Organizational groups

containing only one participant were combined into broader functional categories in the published reporting. Exact positions, tenure, and code-to-position mappings were retained only in confidential research records.

The 12 interviews were not intended to provide statistical power. Their evidentiary value came from the focused single-case question, variation across seven organizational groups, and comparison with workplace observations and longitudinal log data. The sample supported a focused within-case explanation, but not prevalence estimates, department-level comparisons, population representation, or saturation within each organizational group (Hennink & Kaiser, 2022; Mwita, 2022; Wutich et al., 2024).

Three data-collection instruments were used: a semi-structured interview guide, a workplace-observation guide, and a helpdesk-log extraction sheet. Each instrument covered a different part of the case. Interviews captured what informants remembered, experienced, and understood. Observation documented practices visible during the scheduled fieldwork periods, not during a prepared system demonstration. The helpdesk log showed only what had entered the formal system, so it could not capture IT problems solved fully through WhatsApp, direct contact, or other informal channels. Because of that, no single source was treated as enough. The three had to be read together, especially because real work and organizational records can show the gap between official procedure and daily practice (Morgan, 2024). The interview questions also used ordinary workplace language. Informants were not asked about patron-client relations, coercive pressure, decoupling, ceremonial compliance, or user resistance. Those labels could push the answers. They were asked instead about incidents, people contacted, channels used, decisions made, and consequences felt. Table 2 shows the full data-collection instrument grid.

Table 2. Data-Collection Instrument Grid

RQ	Research focus	Interview guide	Observation guide	Helpdesk-log or contextual evidence	Analytical reason
RQ2	Formal introduction of the helpdesk	When and why was the helpdesk introduced? Who supported the decision? What was the system expected to change?	References to the official helpdesk, formal procedures, and assigned responsibilities	Earliest available ticket period and contextual accounts of implementation	Establish whether formal adoption had occurred
RQ1	Actual route for an IT incident	Describe a recent IT problem from the moment it appeared until it was resolved. Who was contacted first? What happened next?	First contact, channel used, people involved, ticket creation, and follow-up route	Ticket-creation date and available incident information	Reconstruct the route used during ordinary work
RQ1	Use of personal channels	Why was this person contacted rather than the formal route? Was the choice related to responsibility, expertise, proximity, urgency, previous success, trust, or convenience? Did either side receive a	Repeated contact with the same person, differences in role or access, response priority, visible reciprocal assistance, and the availability of alternative routes. Felt obligation was assessed	Indirect evidence from low or absent ticket recording; relational features were assessed primarily through interviews and observation	Compare relational explanations with responsibility, expertise, proximity, urgency, and convenience

RQ	Research focus	Interview guide	Observation guide	Helpdesk-log or contextual evidence	Analytical reason
		practical benefit, expect help in return, or feel obliged to maintain the relationship? What happened when that person was unavailable or the request was refused?	through interview accounts rather than observation		
RQ1	WhatsApp and spreadsheet use	How were WhatsApp groups and shared spreadsheets used before and after the helpdesk was introduced? What kinds of work moved through them?	Visible use of WhatsApp, spreadsheets, direct conversation, and parallel channels	Available timing links between an issue and a later ticket	Distinguish legacy coordination from postimplementation bypass
RQ1	Approximate use of informal channels	Roughly what share of IT issues was usually handled through personal contact? About how many active work-related WhatsApp groups or shared spreadsheets were known to the informant?	Groups and files encountered during the observation period	Not applicable	Produce field estimates rather than organization-wide measurements
RQ1 and RQ2	Routine operational helpdesk use	When was the helpdesk normally used? When was it not used? What happened after a ticket was created?	Whether a ticket was created and whether follow-up remained in the system	Ticket activity across the study period	Separate routine operational use from system availability or occasional use
RQ2	Client and consultant involvement	What did clients or consultants ask the company to do? How was the request communicated? Was there follow-up or a stated consequence?	References to audits, consultant visits, or external requirements	Timing of ticket activity around reported external events	Examine external influence without classifying its mechanism in advance

RQ	Research focus	Interview guide	Observation guide	Helpdesk-log or contextual evidence	Analytical reason
RQ2	Internal management practices	How did managers communicate or monitor helpdesk use? What happened when employees used another route? Did managers use the helpdesk themselves?	Instructions, follow-up, managerial channel use, and visible accountability	Ticket activity around reported audit or consultant-visit periods; internal management practices were assessed primarily through interviews and observation	Examine how external expectations were translated into daily practice
RQ1 and RQ2	Different or contrasting experiences	Were there situations in which the helpdesk was preferred or worked well? Did all employees use the same route?	Cases that differed from the more common route	Periods showing comparatively higher or more regular use	Prevent the analysis from treating every employee and period as identical
RQ1 and RQ2	Workflow fit, usability, and training	How easy or difficult was the helpdesk to use? What training or support was provided? Which steps fitted daily work, and which felt unnecessary or difficult?	Visible steps, delays, requests for assistance, and movement from the helpdesk to another channel	Early recorded activity and timing of consultant support, interpreted with internal accounts	Test whether limited routine use could be explained by training, usability, or workflow fit

As Table 2 indicates, each research question was addressed through source-specific evidence rather than by treating interviews, observations, and helpdesk logs as interchangeable. Questions requesting percentages or counts were deliberately approximate. Informants were not expected to calculate organization-wide rates. Estimates of personal-channel use, active WhatsApp groups, and shared spreadsheets were treated as perceptions grounded in daily work rather than complete operational counts. Workforce ranges were provided by management, while implementation-cost ranges were provided by an authorized internal informant. These figures were not independently audited and were used only to describe the case setting.

Fieldwork was done from May to July 2025, when the helpdesk had already been available for about three years. The data came from 12 semi-structured interviews, 10 non-consecutive workplace observations, and available helpdesk records from Q2 2022 to 31 July 2025. Most interviews lasted 45 to 60 minutes, with a few close to 70 minutes. They were conducted in Bahasa Indonesia, recorded with permission, and transcribed. The interview guide kept the discussion on track, but it was not followed like a script. When informants mentioned a printer problem, network failure, access request, spreadsheet issue, audit, or consultant visit, the interviewer asked what happened first, who was involved, what channel was used, and how the issue ended. Informants who had worked there before the helpdesk rollout were asked about both periods. Of the 12 informants, 7 informants had worked in the company before the helpdesk rollout and were therefore eligible to support preimplementation claims. Newer employees were used only to explain current routines and how those routines were taught to new staff, not as evidence of preimplementation practice. Informants were also asked to estimate the approximate share of IT problems that usually moved through personal channels, and to describe the WhatsApp groups and shared

spreadsheets they used. These numbers were treated only as field estimates, not as a full count of all groups, files, or IT incidents.

Observation was done during normal office hours. Ten non-consecutive visits lasted approximately two to four hours each, for about 30 hours in total. The researcher observed work in the IT area, warehouse, administration area, and other approved operational spaces. The observation focused on: what people actually did when work or an IT problem needed attention. The researcher documented whether employees used direct contact, WhatsApp, shared files, the helpdesk, or more than one route during the same event. The observation guide recorded the sequence of action, location, roles involved, first channel used, whether the helpdesk appeared, and how follow-up continued. What was directly observed was kept separate from what employees later said about the event. Private WhatsApp messages were not copied or read. Personal devices and non-work conversations were outside the study.

The log review covered all available helpdesk tickets from Q2 2022 to 31 July 2025. The analysis used only fields needed for the findings: ticket-creation date, available incident-occurrence date, period, and timing around reported audits or consultant visits. Other fields were checked only when needed to clarify a ticket, not turned into separate performance measures. Because the company did not allow detailed monthly operational totals to be published, ticket activity was reported as grouped ranges. The log was read carefully for what it was: formal recorded activity. If an IT problem was solved through direct contact or WhatsApp and no ticket was created, it would not appear in the log. Clients and consultants were also not interviewed. So, any statement about them came from internal accounts and available organizational circumstances. The study only explains how reported client expectations and consultant advice were understood and acted upon inside the company. It does not claim to know the private intentions of those external actors.

The analysis followed an inductive-to-theoretically informed sequence. Theoretical concepts informed the research questions and neutral interview probes, but they were not imposed as first-cycle codes. Initial coding stayed close to actions and events in the field material. Theoretical criteria were applied later to compare possible explanations (Braun & Clarke, 2021; S. Mishra & Dey, 2022; Bingham, 2023; Naeem et al., 2023). The analysis proceeded in six steps:

1. Arranging the material by time: Interview transcripts, observation notes, and ticket periods were placed around the helpdesk rollout. The material was grouped into preimplementation, early implementation, later use, and fieldwork-period practice. Older memories were treated carefully. They were given more weight when the informant had worked in the company before the helpdesk was introduced and when another source pointed to the same practice.
2. Coding the data: The first codes described what people did, such as contacting IT directly, using WhatsApp, opening a ticket, or entering a ticket after an issue had been handled. Two researchers separately coded the same three transcripts, compared their results, and agreed on a shared coding structure. The lead researcher then coded the remaining nine transcripts and observation notes, while the second researcher reviewed new or uncertain interpretations. Coding decisions were recorded in a shared spreadsheet and analytic memos. Comparing the three transcripts was used to clarify the code definitions and discuss differences in interpretation. Coding agreement was discussed rather than converted into an intercoder reliability score.
3. Building categories from supported evidence: The action codes were grouped into categories such as incident-routing practices, legacy coordination, helpdesk use, person-dependent escalation, workflow friction, management reinforcement, and external expectations. A category was kept only when it had clear supporting material. Word frequency alone was not enough to make something a theme.
4. Comparing interviews, observations, and logs: The three sources were compared, but each was used for a different purpose. Interviews explained how informants understood their work. Observations recorded practices seen during fieldwork. Helpdesk logs showed activities entered into the formal system. Evidence was marked as direct, indirect, partial, or not applicable. Differences between the sources were retained because contradictions can reveal details that interviews alone may not capture (Dado et al., 2023).
5. Bringing theory into the analysis: Theory was used after the main field patterns were clear. A practice was called legacy informal coordination only when it had existed before the helpdesk rollout. Workaround was used only for practices that bypassed or changed the formal workflow after implementation (Azad & King, 2008, 2012; Alter, 2014; Mallmann et al., 2018). Trusted-person escalation was not automatically classified as patron-client-like. Responsibility, expertise,

proximity, urgency, and convenience were considered first. The patron-client-like interpretation was used only when the evidence showed unequal access or authority, repeated reliance, durability, reciprocal benefit or obligation, and an effect on formal helpdesk use. Otherwise, the pattern was described more narrowly as a trusted-person relational pathway (Scott, 1972; Eisenstadt & Roniger, 1984).

6. Testing the explanation against rival readings: Client involvement was not automatically treated as coercive pressure. The analysis looked for organizational dependence and a credible consequence. Consultant involvement was not automatically treated as normative pressure either. Professional authority or the spread of an accepted professional norm had to be visible. Decoupling was considered only when formal adoption and formal presentation stayed separate from ordinary operational practice (Meyer & Rowan, 1977; DiMaggio & Powell, 1983; Xiao et al., 2025). Other explanations also stayed in the analysis, including convenience, weak workflow fit, system usability, training, management reinforcement, and role responsibility. The final interpretation was the one that best matched the sequence across interviews, observation, and the log.

After the case-level explanation had been developed, the analysis was synthesized into a preliminary diagnostic lens with three dimensions: the strength of trusted-person routing, the development of legacy informal coordination, and the weakness of sustained management reinforcement for routine helpdesk use. Low, medium, and high qualitative anchors were specified for each dimension. The three dimensions were then combined into four illustrative configurations. Only one configuration: the configuration closest to the focal case, was supported by evidence from this case; the other three are analytical propositions for testing in future studies. The configurations were not statistically derived, did not represent every possible combination of the three dimensions, and were not presented as a validated readiness or scoring instrument.

The helpdesk log was analyzed descriptively to examine recorded timing and activity patterns rather than statistical significance. For internal comparison, ticket activity was organized into equal three-month periods. Because company restrictions required later activity to be published in broader periods, raw totals from periods of different lengths were not compared directly. For contextual comparison, monthly ticket ranges were divided by an internally reported active-user range of 40–50 employees. The resulting figures were treated as approximate descriptive rates because the active-user denominator was not independently verified from user-level system records. Reported audit and consultant-visit dates were compared with ticket-creation dates using an event window covering five working days before through five working days after each event. This window captured activity in the immediately surrounding work period while limiting unrelated ticket activity. The comparison identified temporal proximity only and was not used to infer causation. A ticket was classified as a possible retrospective ticket only when available information showed that the incident had occurred, or had already been handled, before ticket creation and an internal account supported the same sequence. This classification indicated delayed recording, not the reason for it. Because the log captured only formally recorded activity, incidents resolved through direct contact, WhatsApp, or another informal route without a ticket were not visible. Log findings were therefore limited to recorded ticket levels within equal periods, sustained low recorded activity, approximate ticket activity per reported active user, and temporal proximity to reported audits or consultant visits. No event-related increase or causal effect was inferred because the event-window analysis did not use a comparative baseline. Any conclusion about routine operational use was made only after the log evidence had been compared with interviews and observations.

RESULTS AND DISCUSSION

Company Profile

The company in this study is a Jakarta-based distributor of technical components and industrial spare parts. It has operated since the early 2000s and mainly serves factories and small to medium-sized manufacturing companies. Its products include electrical components, bearings, machine parts, and equipment for production maintenance. This is a business-to-business company, not a company that sells directly to end consumers. The business started as a family company and was still managed by the founder's generation when the study was conducted. The CEO was still deeply involved in daily operational matters, not only major company decisions. Many issues that might normally stop at the manager level still moved back to him. This matters because employees were already used to bringing decisions, coordination problems, and work issues to one central figure. At the time of the study, the

company had around 83 to 100 permanent employees. Warehouse and logistics was the largest division because delivery speed and accuracy are very important in the distribution business. Sales were also important because they were closest to revenue. Table 3 shows the estimated number of employees in each division.

Table 3. Division Structure and Estimated Number of Employees

Division	Estimated Number of Employees
Warehouse and Logistics	30 to 35
Sales and Marketing	22 to 26
Finance and Administration	13 to 16
Purchasing	7 to 9
HR and General Affairs	6 to 8
IT	3
Management and Directors	2 to 3
Total	Around 83 to 100

As Table 3 indicates, the case includes operational, commercial, administrative, managerial, and IT functions involved in cross-functional incident routing. About three years before this study, the company started using a helpdesk-based ITSM system. The reason was not only internal improvement. There were two main triggers. First, an external IT consultant suggested a helpdesk system so IT requests and problem records could be tracked more clearly. Second, two major clients began asking vendors to show better service-handling records during supply chain audits. It was not stated as a direct threat, but the message was clear enough. The company needed a system that could be shown during audits. The company chose a web-based helpdesk system supported by the same local IT consultant. The choice was practical. It was considered simple enough to use and cheaper than larger enterprise systems. According to the Head of IT, the direct cost in the first two years was around Rp 39 to 57 million. This included setup, customization, training, consultant support, and supporting equipment. The real cost was higher if employee time for training, transition, and learning is included. With this added, the total investment was estimated at around Rp 80 to 95 million. Table 4 shows the estimated direct cost.

Table 4. ITSM Implementation Investment Components (Estimates, First Two Years)

Cost Item	Estimated Cost
Platform setup and customization	Rp 10 to 15 million
Training for IT staff and key users	Rp 6 to 8 million
Consultant support for two years	Rp 15 to 22 million
Supporting devices and technical needs	Rp 8 to 12 million
Total direct cost	Rp 39 to 57 million

As Table 4 indicates, the direct implementation cost covered platform setup, training, consultant support, and supporting technical needs during the first two years. At the beginning, the helpdesk system was used quite often. After a few months, the use started to decline. The Head of IT mentioned this, and informants from other departments described the same pattern. By the second year, the tickets in the system no longer showed the real number of IT issues happening in daily work. When the study was conducted, the helpdesk system was still available, and the license was still being paid for. But daily IT coordination had mostly gone back to the old ways. Employees continued to use the channels they already trusted before the helpdesk system was introduced.

Personal Relationships as the Primary Channel for Resolving IT Issues

Evidence about the period before implementation did not come from all twelve interviews. It was reconstructed only from informants whose employment before the helpdesk rollout had been confirmed in the confidential research records. The Head of IT, who had worked in the company for more than ten years, provided the clearest longitudinal account. Other eligible pre-rollout accounts were retained only when another informant or source pointed to the same practice. Read together, these accounts placed trusted-person contact, WhatsApp-based coordination, and shared spreadsheet use before the formal helpdesk was introduced. Accounts from newer employees were used only to explain current routines and

how those routines were learned. These practices were therefore treated as legacy informal coordination, while workaround referred only to their post-rollout use when they bypassed or altered the formal helpdesk workflow.

Across the twelve informants, the current incident-routing pattern was clear. When an IT problem happened, employees usually did not open the helpdesk system first. They contacted the person they knew. Some sent a WhatsApp message. Some called directly. Others walked to the person they thought could solve the issue. The ITSM system was available, and employees knew it existed, but it was rarely the first route in daily work. This fits the Indonesian workplace context, where problems are often brought to trusted people or people with authority, not only to formal procedures (Irawan, 2017). In this company, the main person was the Head of IT. He had worked there for more than ten years, was known by many division heads, and his phone number was saved by many employees. In the warehouse, staff often went straight to field technicians because they were nearby. Some senior staff in other divisions also became informal helpers because they were seen as "good with computers." So the route was not random. It followed people who were trusted, close, or seen as able to get things done. This kind of daily coordination through personal links has also been noted in other Indonesian organizations, even when formal rules already exist (Adisel et al., 2023; Aida et al., 2020).

The reason was practical. Personal contact felt faster and clearer. One senior sales staff member said, "If my email is down early in the morning, I immediately WhatsApp the IT person who usually handles it. I get a response within five minutes. If I go through the system, I don't know where to start." A warehouse staff member said he had never used the helpdesk. When the label printer did not work, he simply went to the technician. A division head gave a similar example when the office internet went down. He did not open a ticket. He went directly to the director and said, "I went to his room and told him directly. Ten minutes later, someone was already fixing it. Why bother with the system first?" For users, this was not seen as breaking the system. It was just the easiest way to keep work moving. The helpdesk felt like an extra step, not a better route. Table 5 shows how informants estimated the share of IT issues usually handled through personal channels.

Table 5. Informants' Estimated Share of IT Requests Handled Through Personal Channels

Estimated share of IT requests handled through personal channels	Number of informants	Share of informants
More than 70%	10	83.33%
50% to 70%	1	8.33%
Less than 50%	1	8.33%
Total	12	100%

As Table 5 shows, ten of the twelve informants estimated that more than 70 percent of their IT issues were handled through personal channels. One finance staff member gave a lower estimate, around 50 to 70 percent, because he was still new and did not yet feel comfortable contacting people he did not know well. The estimate below 50 percent came from the Head of IT, whose role provided a different vantage point on both formal tickets and informal requests received by IT. This supports Davison and Ou's point that workplace relationships can become more important than formal systems, especially when those relationships already existed before the official system was introduced (Davison & Ou, 2018). What matters is not only the number. It is also how normal the practice felt. No informant described personal contact as hidden, wrong, or embarrassing. One purchasing staff member said it plainly: "That's just how things work here. Everyone can just talk directly to anyone." Management also never made a strict rule that every IT issue had to go through ITSM. Even the CEO used personal channels when a problem needed quick action. That gave employees a clear signal. Personal contact was acceptable, even if it was never written as a formal rule.

The two lower estimates show that the routing pattern was not identical across roles or tenure. The newer finance informant's estimate reflected limited familiarity with established personal contacts, whereas the Head of IT's lower estimate reflected his position as the person receiving, rather than sending, many informal requests. The search for contrasting accounts did not identify an informant who described the formal helpdesk as the preferred first route for routine IT problems. These differences qualify the dominant pattern but do not overturn it, and the sample does not support department-level comparisons.

The evidence supports a durable trusted-person relational pathway with partial patron–client-like features, not a patron–client-like or full patron–client relationship. Unequal access or authority was visible in the roles of the Head of IT, technicians, senior employees, and the CEO. Repeated reliance, durability, and an effect on whether the formal helpdesk was used were also supported. Reciprocal practical benefit or felt obligation, however, was not demonstrated clearly enough to satisfy the classification criterion stated in the Method. Responsibility, expertise, proximity, urgency, previous success, convenience, workflow friction, and weak management reinforcement remain complementary explanations. The result is therefore classified as a trusted-person relational pathway, while patron–client theory remains a bounded interpretive lens (Scott, 1972; Eisenstadt & Roniger, 1984).

The temporal distinction is important. Before the helpdesk rollout, direct contact, WhatsApp, and shared spreadsheets were legacy informal coordination practices because they already supported incident handling and daily coordination. After rollout, particular episodes became workarounds only when employees used those established routes instead of the available formal helpdesk workflow. The same channel therefore had a different analytical status at different times. This case extends workaround research by showing how a pre-existing informal order can later provide the channels through which post-implementation bypass occurs (Azad & King, 2008, 2012; Alter, 2014; Mallmann et al., 2018).

WhatsApp and Spreadsheets as a Functioning Coordination System

RQ1 also showed that routine coordination extended beyond trusted-person contact to WhatsApp and shared spreadsheets. These tools were not introduced as formal management systems, yet interviews and observations indicated that they had become established channels for operational updates, cross-functional coordination, and IT-related requests before and after helpdesk implementation.

There was no formal decision saying that work coordination had to use WhatsApp. The groups appeared one by one. Warehouse staff made groups for delivery updates and outgoing goods. Sales teams made groups by area because weekly meetings were not enough for daily work. For tasks involving more than one division, people also created cross-division groups. The formal channels still existed, but for daily coordination they felt slow and awkward. WhatsApp stayed because work moved there. A problem could be sent, answered, and followed up quickly. This fits information systems studies showing that a way of working can be accepted because it helps work, not because it is written in the rules (Jensen et al., 2009). In Indonesia, this is also not surprising. Many workplaces are more used to direct and personal coordination than formal procedures that feel distant (Irawan, 2017).

Most divisions did not have only one WhatsApp group. They had several groups for different needs. Table 6 gives an estimate based on interviews and observation. The company did not keep an official list of all work-related WhatsApp groups, so the figures should be read as field estimates, not exact operational statistics.

Table 6. Interview- and Observation-Based Estimate of Active WhatsApp Groups Used for Work Coordination

Group category	What the group is usually used for	Estimated number of active groups
Internal division groups	Groups used by people within the same division to coordinate daily work.	
Warehouse and Logistics	Used for warehouse coordination, delivery updates, and returned goods.	3 to 4
Sales and Marketing	Used by sales teams for each sales area and for target updates.	3 to 4
Finance and Administration	Used for finance and general administration coordination.	1 to 2
Purchasing	Used for purchasing team coordination.	1
HR and General Affairs	Used for HR and general office matters.	1
IT	Used by the IT team to coordinate technical issues.	1
Subtotal for internal division groups		10 to 13

Group category	What the group is usually used for	Estimated number of active groups
Cross-division coordination groups	Used when work involves more than one division, such as warehouse and sales for urgent deliveries, sales and finance for client invoices, or IT and division heads for technical problems.	8 to 10
Groups with clients and external vendors	Used to update clients about delivery and stock, or to confirm orders and product availability with suppliers.	6 to 10
Estimated total active groups		24 to 33

Not every WhatsApp group was made for IT issues. As Table 6 shows, WhatsApp was already inside daily coordination. People checked it, gave updates there, and asked for help there. So when IT problems appeared, using WhatsApp felt natural. The same thing happened with spreadsheets. Divisions used shared spreadsheets on local servers or Google Drive for stock updates, sales pipelines, delivery schedules, unpaid invoices, internal requests, and operational problems. Based on the Head of IT and several division heads, around eight to twelve main spreadsheets were actively used. This was also an estimate. There was no official company list, and the number did not include duplicate or personal files made by staff.

These WhatsApp groups and spreadsheets usually had no formal owner. Still, people knew who took care of them. In many divisions, one or two senior staff quietly became the person others depended on. They updated the file, knew which version was current, and knew which data should be trusted. No one formally assigned them. It was not written in the job description. But in daily work, everyone knew whom to ask. One senior finance admin said, “No one appointed me. Maybe because I’m the one who usually updates it. So when something changes, they just tag me.” This kind of arrangement made sense in a company where coordination depended on trust, familiar routines, and habits that had slowly become normal (Lukiyanto et al., 2018; Adisel et al., 2023).

The same applied to the rules of use. They were not formal, but people understood them. New employees learned by watching others. Important WhatsApp messages had to tag the right person, or they might be missed. Delivery proof photos were usually sent with a certain caption style, even though it was not written in the SOP. Spreadsheets also had unwritten rules. Some columns were normally edited only by certain people. Even when anyone could edit the file, people did not always trust a change unless the usual person had checked it.

Several issues that the formal helpdesk was intended to record—including password resets, printer problems, connectivity issues, shared-folder access, and email problems—were repeatedly described as being handled through WhatsApp. During months 13–15, average recorded helpdesk activity remained within the 0–6 monthly range shown in Table 8, while interviews and observations documented continuing IT coordination through WhatsApp and direct contact. Taken together, these sources indicate that the helpdesk log did not capture the full flow of operational IT issues. As the Head of IT explained, “If I want to know what IT issues are actually happening today, I don’t open the helpdesk dashboard. I scroll through WhatsApp.”

Prior studies show that when formal systems do not fit daily work, employees often build side channels or their own tools to keep work moving (Alter, 2014; Davison & Ou, 2018; Mallmann et al., 2018; White, 2023). But this case is sharper. WhatsApp and spreadsheets were not created because ITSM failed. They were already there before ITSM arrived. Employees already knew who to ask, which file to follow, and which channel would get a response. So ITSM did not enter an empty space. It entered a workplace that already had a working informal coordination system. Familiar. Useful. Trusted. And not easy to replace (DiMaggio & Powell, 1983; Azad & King, 2008, 2012).

External Expectations, Formal Adoption, and Routine Use

This section answers RQ2 by examining how reported client expectations and consultant advice were understood inside the company, how they contributed to formal adoption, and why they did not produce sustained routine helpdesk use. Internal accounts indicated that the consultant recommended, configured, and supported the helpdesk, while major clients were understood to expect more organized

service records that could be presented during supply-chain audits. These external inputs helped explain why the company acquired and introduced the system. They did not change routine work because personal channels, WhatsApp, and spreadsheets remained faster and more familiar, while management did not consistently require employees to use the helpdesk. Unlike Tables 5 and 6, which present informants' estimates, the usage pattern examined in this section draws mainly on helpdesk logs checked with the Head of IT.

Clients and consultants were not interviewed. The evidence therefore concerns how their reported expectations and advice were understood and acted upon inside the company, not their private intentions. The material does not establish coercive pressure because organizational dependence and credible consequences for noncompliance were not demonstrated. It also does not establish normative pressure because professional authority or the diffusion of an accepted professional norm was not directly shown. The safer interpretation is that reported external expectations and advice were translated into system acquisition and audit-facing records, while internal reinforcement of routine helpdesk use remained weak (Meyer & Rowan, 1977; DiMaggio & Powell, 1983). Table 7 summarizes the two reported external inputs, their organizational interpretation, and the limits of their influence on routine helpdesk use.

Table 7. Reported External Expectations and Their Organizational Translation

Reported external source	Reported expectation or advice	Internal translation and observed limit
External IT consultant	The consultant recommended the helpdesk, helped configure it, trained users, and supported the company for two years.	The advice contributed to system acquisition and implementation. It did not create an enforceable requirement for employees to use the helpdesk in daily work.
Two major clients	Internal accounts indicated that the clients expected more structured service records that could be presented during supply-chain audits.	The company retained the system and prepared records for audits. The evidence did not show that the clients monitored routine helpdesk use or imposed direct consequences when employees used other channels.

As Table 7 shows, both external inputs were translated mainly into system acquisition and audit-facing records. Neither was accompanied by a demonstrated requirement for sustained daily use. Routine helpdesk use therefore depended on internal management reinforcement, which remained weak, rather than on the mere presence of consultant advice or reported client expectations.

The full available helpdesk log was examined, but Table 8 reports the first 15 months in equal three-month periods because those periods could be compared directly under the company's publication restrictions. Later records were used only as broader contextual evidence and were not compared directly with the equal-length periods. The reported ranges describe formally recorded activity rather than total incident occurrence, user acceptance, or routine operational use. For contextual comparison, the monthly ranges were divided by an internally reported range of 40–50 active users. Because user-level records did not independently verify this denominator, the resulting values are approximate descriptive rates only.

Table 8. Average Monthly Recorded ITSM Ticket Activity by Three-Month Period

Three-month period	Average Monthly Recorded Tickets (Reported Range)	Contemporaneous context reported by informants
Months 1 to 3	45 to 56	Training and frequent consultant presence were reported during this period. The table does not attribute the recorded activity causally to either condition.
Months 4 to 6	16 to 28	Recorded activity was lower than in months 1–3. Informants also reported less frequent consultant support and continued use of informal routes.
Months 7 to 9	6 to 11	Recorded activity declined further, while interviews described increasing reliance on established informal routes.

Three-month period	Average Monthly Recorded Tickets (Reported Range)	Contemporaneous context reported by informants
Months 10 to 12	2 to 5	Recorded activity remained low relative to the earlier periods.
Months 13 to 15	0 to 6	Recorded activity remained low, with some entries reported near audits or consultant visits. This indicates timing only, not purpose or causation.

As Table 8 shows, recorded helpdesk activity was substantially lower in the later three-month periods than in the first three months. The table does not establish whether total IT incidents declined, whether employees accepted or rejected the system, or whether reduced consultant presence caused the change. Those interpretations were considered only after the log pattern had been compared with interviews and observations. The first three months provide a temporal contrast: recorded activity was higher while training was recent and weekly consultant support was reported, then lower in the later equal-length periods. This association does not establish that consultant presence caused the difference. Read together with interviews and observations, it indicates that early recorded use was not sustained as a routine after implementation support became less frequent (Azad & King, 2008).

Activity recorded during months 13–15 included at least one internally corroborated case of delayed formal recording. Before a client audit, the Head of IT reported that he had been asked to make sure the helpdesk appeared active. Some issues that had already been raised and resolved through WhatsApp were then entered as tickets close to the audit date. He explained: “Before the client audit, we tidy up the system first. We fill in some old tickets that hadn’t been entered yet. Once the audit is over, well, we go back to business as usual.”

This sequence supports a possible pattern of ceremonial use and a separation between ordinary incident handling and audit-facing documentation. It does not establish that every ticket created near an audit or consultant visit was entered for display, nor does it establish manipulation or misconduct. The broader interpretation of decoupling rests on the repeated separation between formal presentation and ordinary work across interviews, observations, and the log, not on this single case alone (Meyer & Rowan, 1977; Xiao et al., 2025).

The client saw the formal system. But daily work still ran through WhatsApp, direct contact, and personal follow-up. The system mattered most when the company needed to look orderly from the outside. After the audit, the old routine returned. This fits earlier studies showing that organizations may display compliance to answer outside demands, while internal routines change very little (Azad & King, 2012; Pache & Santos, 2013).

Informants reported renewed attention to the helpdesk before consultant visits. Some ticket entries occurred within the prespecified event windows, but the analysis had no comparative baseline and therefore could not establish an increase caused by those visits. The evidence supports temporal proximity and episodic attention to the system, not a causal effect of consultant presence. Outside audits and consultant visits, daily IT work still followed the old channels. If the internet went down, employees did not stop to open a ticket. They contacted the Head of IT or used the usual WhatsApp route. For smaller issues, such as printers, senior staff often told new staff to WhatsApp the technician instead of using the helpdesk. So the pull away from ITSM did not come only from managers. It also came from coworkers. New staff learned quickly that the normal way was to contact the person who could fix the problem faster.

The same pattern appeared across interviews, observation, and logs. Employees said they used personal channels. Observation showed WhatsApp groups and spreadsheets still being used in ordinary work. The log showed that helpdesk tickets did not become the main record of daily IT issues. The Head of IT also explained why ticket activity appeared around audits or consultant visits. Table 9 shows how the main claims were supported by different data sources.

Table 9. Triangulation of Key Empirical Claims Across Data Sources

Claim	Interview Evidence	Observation Evidence	Log Evidence
Personal channels (trusted individuals) are the primary route for resolving IT problems	Strong: repeated, spontaneous accounts from all twelve informants	Confirmed: informal contact observed during fieldwork visits	Indirect: consistent with low routine ticket volume outside audit windows
WhatsApp and spreadsheets function as the de facto coordination system	Strong: described in detail by informants across divisions	Confirmed: groups and files actively used during observation	Not applicable: outside the scope of the helpdesk log
Some ticket entries occurred within the prespecified windows around reported audits and consultant visits	Reported directly by the Head of IT	Not directly observed, since fieldwork did not coincide with an audit or a consultant visit	Direct for temporal proximity only: ticket-creation dates were identified within the prespecified five-working-day-before to five-working-day-after windows. No comparative baseline was defined for inferring that activity was higher.
Some tickets were entered after the incident had already been resolved elsewhere	Confirmed by the Head of IT	Not directly observed	Partial: at least one internally corroborated delayed entry met both conditions. The available evidence did not establish how many other tickets followed the same sequence.
The trusted-person pathway showed unequal access or authority, repeated reliance, durability, and an effect on formal helpdesk use; reciprocal benefit or felt obligation was not clearly demonstrated	Partial: repeated reliance, trust, role differences, and durability were described, but reciprocal benefit or obligation was not established	Partial: current trusted-person routing was observed during the three-month fieldwork period	Not applicable: the log cannot demonstrate relational reciprocity or obligation

As Table 9 shows, current trusted-person routing and informal coordination were supported across more than one source. Evidence concerning audit-related timing was narrower because the relevant events were not directly observed, while evidence for reciprocal benefit or felt obligation remained incomplete. The table therefore supports a trusted-person relational pathway with partial patron–client-like features, but not a patron–client-like or full patron–client relationship.

Internal Translation and the Adoption–Use Gap

This section answers RQ2 through the internal translation of reported external inputs. Reported client expectations and consultant advice were translated into system acquisition, configuration, training, and records that could be presented during audits. They were not translated into a consistently reinforced rule requiring ordinary incidents to begin and remain in the helpdesk. Managers continued to use or accept personal channels, incidents handled outside the system remained acceptable, and no clear internal consequence followed nonuse. Formal adoption therefore occurred, but routine operational use did not become established.

This conclusion is more precise than stating that external pressure simply failed. Because clients and consultants were not interviewed, the evidence does not establish coercive or normative pressure in the strict institutional sense. It shows that reported external inputs reached the formal adoption decision but weakened during their internal translation into daily practice. The resulting separation between formal presentation and ordinary incident handling is consistent with decoupling. Convenience, expertise, proximity, workflow friction, usability, training, competing work practices, and weak management reinforcement remain contributing explanations (Meyer & Rowan, 1977; DiMaggio & Powell, 1983; Besharov & Smith, 2014; Xiao et al., 2025).

Preliminary Retrospective Diagnostic Lens for Routine Helpdesk Use

The diagnostic lens is a retrospective synthesis of the focal case. It organizes conditions associated with limited routine helpdesk use after formal adoption; it is not a validated readiness model, scoring tool, or predictor of implementation success. The organization's earlier condition was reconstructed from eligible pre-rollout accounts, current observations, and longitudinal helpdesk records rather than observed prospectively. The lens contains three dimensions: the strength of trusted-person routing, the development of legacy informal coordination, and the weakness of sustained management reinforcement for routine helpdesk use. These dimensions connect the established personal route, informal tools already performing operational functions, and the organization's reinforcement of the formal process. Only the high-end pattern closest to the focal case was empirically supported. The low and medium anchors and the remaining configurations are analytical propositions for future prospective testing (Walsham, 2006; Yin, 2013).

The first dimension is the strength of trusted-person routing. This looks at whether people follow official IT procedures or go straight to a person they trust. The personal route is strong when almost everyone knows who to contact, uses that route openly, and does not feel they are doing anything wrong. If leaders use the same route, the signal becomes stronger. People read it as acceptable, even without written rules (Irawan, 2017; Lukiyanto et al., 2018; Adisel et al., 2023).

The second dimension is the development of legacy informal coordination. This happens when WhatsApp, spreadsheets, or personal notes no longer work as small side tools, but start replacing official system functions. An IT request may be discussed in WhatsApp, recorded in a spreadsheet, and traced more easily through chat than through ITSM. The warning sign is stronger when informal coordinators are already known, unwritten rules are followed, and side channels are more active than the official system. At that point, informal practice is no longer a temporary shortcut. It has become an organizational habit (Azad & King, 2008, 2012; Mallmann et al., 2018; Bartelheimer et al., 2023). This usually happens when the formal system feels slow, rigid, impractical, or less useful than the informal route (Davison & Ou, 2018; Fürstenau et al., 2021; Ogedengbe et al., 2024).

The third dimension is the weakness of sustained management reinforcement for routine helpdesk use. This dimension is read in reverse: low means that leaders consistently model, monitor, and reinforce use of the formal system, while high means that reinforcement is intermittent or absent. Reported client expectations or consultant advice may contribute to formal adoption, but routine use still depends on clear internal rules, follow-up, and consequences when incidents remain outside the helpdesk. Where leaders accept alternative channels and no consequence follows nonuse, formal presentation can remain separated from daily work (DiMaggio & Powell, 1983; Iden & Eikebrokk, 2013; Xiao et al., 2025). Routine use therefore requires sustained leadership reinforcement rather than occasional reminders around audits or consultant visits (Saghafian et al., 2021; De Vargas Pinto et al., 2023).

Table 10 is not a checklist and not a scoring tool. It is an interpretive synthesis of the interviews, observation, and log evidence discussed earlier. Its job is only to help readers compare three conditions: whether ITSM still has room to become normal, whether the organization is split between formal and informal routes, or whether the old route has already pushed the formal system into the background.

Table 10. Preliminary Qualitative Diagnostic Lens for ITSM Adoption Conditions

Dimension	Low	Medium	High
Dimension 1: Strength of trusted-person routing	IT problems are still handled through a mix of the official system and personal help. There is no single person widely known as "the person to go to" for IT problems. Management still encourages people to use the official system.	Some people are already contacted personally for IT help. However, the personal route has not fully replaced the official system. Management tends to allow this practice but does not openly encourage or forbid it.	The personal route has become the main way to solve IT problems. Almost everyone knows who to contact when something goes wrong. Management also uses this route, so people see it as accepted.
Dimension 2: Development of legacy informal coordination	Informal communication exists, such as chat messages or direct help, but it is still scattered and has no clear pattern. No one is clearly seen as the informal coordinator. ITSM functions are not yet handled through informal channels.	Informal coordination has started to take shape. Some ITSM related work is handled outside the official system, but not all processes have moved there. Some parts still depend on the formal system.	Informal coordination already works like its own system. There are people who manage it, even without official appointment. There are unwritten rules that many people follow. In daily work, the informal route is more active than the official system.
Dimension 3: Weakness of sustained management reinforcement for routine helpdesk use	Leaders consistently use and require the helpdesk. Rules, follow-up responsibilities, and consequences for bypassing the formal process are clear.	Reinforcement is intermittent. Helpdesk use receives attention during implementation, audits, or consultant visits, but leaders do not reinforce it consistently in ordinary work.	Leaders do not consistently model, monitor, or require helpdesk use. Alternative channels remain acceptable, and no clear consequence follows when incidents stay outside the formal system.

As Table 10 indicates, the focal case was interpreted as high in trusted-person routing, high in the development of legacy informal coordination, and high in the weakness of sustained management reinforcement for routine helpdesk use. This placement is case-bounded and retrospective.

Based on these three dimensions, this study identifies four organizational conditions. These are not final categories for every organization. They are qualitative ideal types. Some organizations may fall between two types. If that happens, the point is not to force a label. The point is to see which type is closest, then read what kind of ITSM adoption outcome is most likely.

The word captured means that the space ITSM is supposed to formalize has already been taken over by older informal practices. These practices may include personal requests, WhatsApp coordination, spreadsheet tracking, and dependence on trusted people. The strongest condition is the entrenched informal field. In that condition, the formal helpdesk competed with legacy informal coordination and with post-implementation episodes in which those established routes bypassed the available formal workflow. It is pushed aside by a trusted relational order that employees see as safer, faster, and more useful. Table 11 summarizes these four types along with their provisional routine-use implication.

Table 11. Four Illustrative Configurations of the Three Diagnostic Dimensions

Illustrative configuration	Dim. 1	Dim. 2	Dim. 3	Organizational condition	Proposed expectation
Open field	Low	Low	Low	Neither trusted-person routing nor legacy informal coordination dominates, while sustained management reinforcement remains strong.	Routine helpdesk use may be more feasible. This is an analytical proposition.
Contested field	Low–Medium	Low–Medium	Low–Medium	Formal and informal routes coexist without either becoming fully dominant.	Routine use may remain uneven and sensitive to workflow fit and management reinforcement. This is an analytical proposition.
Partly captured field	Medium–High	Medium–High	Medium	Trusted-person routing and legacy coordination are established, while management reinforcement is intermittent.	Formal use may remain unstable. This is an analytical proposition.
Entrenched informal field	High	High	High	Trusted-person routing and legacy coordination dominate ordinary work, while sustained management reinforcement is weak.	In the focal case, formal adoption coexisted with limited routine operational use.

As Table 11 indicates, the focal case falls closest to the entrenched informal field configuration. Trusted-person routing was widely accepted, legacy WhatsApp- and spreadsheet-based coordination remained active, and sustained management reinforcement for routine helpdesk use was weak. Reported client expectations and consultant advice contributed to formal adoption and audit-facing records but were not translated into a consistently reinforced routine. Formal availability therefore coexisted with established informal incident routes. This is a case-level analytical explanation, not a prevalence estimate or a prediction for other organizations (Amuha & Masiero, 2026; Woldeyohannes et al., 2023).

Synthesis of Findings Across RQ1 and RQ2

Across RQ1 and RQ2, the case shows a temporal sequence rather than a single adoption failure. Trusted-person routing and WhatsApp- and spreadsheet-based coordination existed before the helpdesk. After formal adoption, those established routes continued to handle ordinary incidents, while recorded helpdesk activity declined and appeared episodically around some reported external events. The formal system therefore remained available without becoming the normal operational route.

This sequence extends workaround and shadow-IT research by distinguishing the legacy origin of an informal practice from its later use to bypass an available formal workflow (Azad & King, 2008, 2012; Alter, 2014; Davison & Ou, 2018; Mallmann et al., 2018). It also refines the institutional interpretation. Reported external expectations contributed to formal adoption, but weak internal translation and reinforcement allowed formal presentation and ordinary work to remain separated, consistent with decoupling (Meyer & Rowan, 1977; Xiao et al., 2025).

The explanation does not eliminate simpler alternatives. Responsibility, expertise, proximity, urgency, previous success, convenience, workflow friction, usability, training, and management reinforcement all had explanatory relevance. The relational contribution is narrower: reliance on trusted individuals became durable, organizationally accepted, and consequential for formal helpdesk use.

Because reciprocal practical benefit or felt obligation was not clearly demonstrated, the result is classified as a trusted-person relational pathway with partial patron–client-like features; neither a patron–client-like nor a full patron–client relationship is established. Table 12 compares the case findings with the four explanatory strands used in the analysis and states the bounded contribution associated with each.

Table 12. Relationship Between the Case Findings and the Explanatory Literature

Explanatory literature	What the literature explains	What this case contributes
Formal adoption, institutional influence, and decoupling (DiMaggio & Powell, 1983; Meyer & Rowan, 1977)	External expectations can influence formal organizational structures, while formal presentation may remain separated from ordinary work.	Reported client expectations and consultant advice were translated into acquisition, training, and audit-facing records, but not into sustained routine helpdesk use. The case does not independently establish coercive or normative pressure.
Workarounds and shadow IT (Alter, 2014; Azad & King, 2008, 2012; Davison & Ou, 2018; Mallmann et al., 2018)	Employees may use routes outside formally governed systems to maintain responsiveness or work fit.	Direct contact, WhatsApp, and spreadsheets predated the helpdesk. They were legacy informal coordination before rollout and became workarounds only in post-implementation episodes that bypassed the available workflow.
Multiple institutional logics and selective coupling (Besharov & Smith, 2014; Pache & Santos, 2013)	Formal and informal ways of working can coexist, compete, or be selectively combined.	The formal helpdesk remained available and was used episodically, while ordinary incident handling continued through established informal routes.
Trusted-person pathways and patron–client-like relations (Eisenstadt & Roniger, 1984; Scott, 1972)	Patron–client-like relations require asymmetry, durability, repeated reliance, and reciprocal exchange or obligation.	The case supports unequal access or authority, repeated reliance, durability, and an effect on helpdesk use. Reciprocal benefit or felt obligation was not clearly demonstrated, so the result is classified as a trusted-person relational pathway with partial patron–client-like features.

As Table 12 shows, the case contribution comes from connecting the temporal origin of informal coordination, its post-implementation use, incomplete internal translation of external expectations, and durable trusted-person routing without treating any one theoretical interpretation as automatically proven.

The study makes three bounded contributions. First, it introduces a temporal distinction between legacy informal coordination that predates a platform and workarounds that arise when those established routes bypass an available formal workflow after implementation. Second, it shows how reported external expectations can contribute to formal adoption without producing routine operational use when those expectations are not translated into sustained internal reinforcement. Third, it develops a preliminary three-dimensional diagnostic lens. Only the configuration closest to the focal case is empirically supported; the other three configurations are analytical propositions for future testing. The relational finding is deliberately narrower. The case shows a durable trusted-person pathway involving unequal access or authority, repeated reliance, and an effect on helpdesk use. Because reciprocal benefit or felt obligation was not clearly demonstrated, the study does not claim a fully established patron–client relationship. Instead, it identifies patron–client-like features as a theoretically relevant possibility that future information-systems research should test with evidence designed specifically to capture reciprocity and obligation.

For organizations displaying conditions comparable to the focal case, ITSM implementation should begin with a mapping of actual incident routes, informal tools, and management reinforcement rather than with system configuration alone. Recent incidents can be traced from first contact to resolution to identify dependence on particular problem solvers, WhatsApp groups, shared spreadsheets, and points at which work does or does not enter the formal helpdesk. The three dimensions provide an exploratory structure for interpreting this evidence; they are not a readiness score or a predictor of implementation success. The mapping can inform implementation decisions. Dependence on particular individuals may

require explicit escalation and backup roles. Informal channels already carrying essential work may require integration, migration, or clearly defined boundaries with the helpdesk. Weak management reinforcement may require leaders to model formal use, review incidents handled outside the system, and follow up when the agreed process is bypassed. These are case-derived implications rather than tested interventions (Iden & Eikebrokk, 2013; Saghafian et al., 2021; MacLean & Titah, 2023; De Vargas Pinto et al., 2023). Digitalization support that provides software and training without examining existing work routes may leave daily practices largely unchanged (Lutfiani et al., 2025).

Several limitations bound the findings. The study examined one organization and used 12 interviews across seven organizational groups; it did not establish prevalence, department-level saturation, or population representation. Preimplementation practices were reconstructed retrospectively rather than observed directly. Clients and consultants were not interviewed, and no audit or consultant visit occurred during workplace observation. Private WhatsApp content was not accessed, group and spreadsheet counts were field estimates, and the helpdesk log captured only formally recorded activity. Reported external-event dates and the 40–50 active-user denominator were obtained internally and were not independently verified. The patron–client-like interpretation is also limited by incomplete evidence of reciprocal benefit or felt obligation. The three-dimensional lens is preliminary, only one illustrative configuration was supported by the focal case, and none of the proposed implications was tested as an intervention. Future research should use prospective multi-case designs, include external actors where access permits, verify event dates and user denominators, report complete event-window results, examine contrasting cases of sustained helpdesk use, and collect evidence specifically designed to test reciprocity and obligation. The remaining three configurations should be treated as propositions until they are observed and compared across organizations.

CONCLUSION

This study concludes that formal ITSM adoption did not become routine operational use because the helpdesk entered an organization where trusted-person routing and legacy WhatsApp- and spreadsheet-based coordination already carried daily work. For RQ1, these practices predated implementation, remained accepted afterward, and constituted workarounds only in post-implementation episodes that bypassed the available helpdesk workflow. For RQ2, reported client expectations and consultant advice contributed to acquisition, configuration, training, and audit-facing records, but the organization did not translate those inputs into a consistently reinforced rule for routine incident handling. The resulting separation between formal presentation and ordinary work is consistent with decoupling, while the evidence does not establish strict coercive or normative pressure. The relational evidence supports a trusted-person relational pathway with partial patron–client-like features, marked by unequal access or authority, repeated reliance, durability, and an effect on helpdesk use; reciprocal benefit or felt obligation remained incomplete, so neither a patron–client-like nor a full patron–client relationship is established. The conceptual contribution is a preliminary lens comprising the strength of trusted-person routing, the development of legacy informal coordination, and the weakness of sustained management reinforcement for routine helpdesk use; only the entrenched informal field was observed, while the other configurations remain propositions. In practice, implementation should begin by mapping incident routes and informal tools, assigning escalation and backup roles, defining links between informal channels and the helpdesk, and reinforcing routine use through leadership and follow-up. These case-derived implications require prospective multi-case testing.

ACKNOWLEDGMENTS

The authors thank the participating organization and informants for providing access, time, and information for this study.

AUTHOR CONTRIBUTIONS

Conceptualization by M.M; Methodology by M.M; Software by M.M; Validation by M.M; Formal Analysis by M.M and T.A.M; Investigation by M.M and T.A.M; Writing - Original Draft Preparation by M.M and T.A.M; Writing - Review & Editing by M.M and T.A.M.

CONFLICTS OF INTEREST

The author(s) declare no conflict of interest.

USE OF ARTIFICIAL INTELLIGENCE (AI)-ASSISTED TECHNOLOGY

The authors declare that no artificial intelligence (AI) tools were used in the generation, analysis, or writing of this manuscript. All aspects of the research, including data collection, interpretation, and manuscript preparation, were carried out entirely by the authors without the assistance of AI-based technologies.

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