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DIALECTICAL TENSIONS BETWEEN GLOCALIZATION AND GROBALIZATION FOR  
WAL-MART IN THE UNITED STATES

by

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B.A. University of Central Florida, 2009

A thesis submitted in partial fulfillment of the requirements  
for the degree of Master of Arts  
in the Nicholson School of Communication  
in the College of Sciences  
at the University of Central Florida  
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## **ABSTRACT**

This qualitative analysis examines Wal-Mart managers' perspectives of the strategies that the U.S. corporation has implemented in order to increase its sales and profits at more than 4,000 stores in local U.S. communities. Two theoretical paradigms are specifically used: glocalization and grobalization. The former refers to cultural adaptation; the latter means standardization. The ultimate goal of the researcher is to identify the dialectical tensions between those two current forms of globalization. In-depth, face-to-face, qualitative interviewing of ten Wal-Mart managers in Central Florida allowed the researcher to actually comprehend managers' perspectives, gather fresh data, and construct a final product to enlighten readers on the current Wal-Martization of the United States. Throughout the data reduction process, four key themes surfaced as the most relevant to the initial research questions: (1) Awareness of Glocalization as Key to Success, (2) Grobalization Strategies Implemented, (3) Centralization as a Pattern of Grobalization, and (4) Organizational Socialization.

Overall, it was found that Wal-Martization is a process that requires complex strategies and efforts to match the contemporary conditions of globalization. Meeting the needs of local Wal-Mart stores varies from one geographical location to the next. While, by definition, grobalization is a reversal of the meaning of glocalization, this study has revealed that part of Wal-Mart's phenomenal success is to be both grobalizing and glocalizing. Wal-Mart offers its customers the opportunity of consuming locally (e.g., Hispanic products, Mediterranean food), globally (e.g., universal U.S. merchandise), or both simultaneously (like products and traditions found in Orlando stores). In this sense, both glocalization and grobalization are effective for the successful Wal-Martization of U.S. communities.

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## CHAPTER ONE: INTRODUCTION

The Wal-Mart corporation has grown to be the largest retailer worldwide since its establishment in 1962. To put this into perspective, Wal-Mart has 8,416 retail units across the world; approximately fifty percent of these units are located within the United States ([www.walmartstores.com](http://www.walmartstores.com)). Besides the corporation's large number of brick-and-mortar stores, an online presence is maintained through its successful virtual stores. Wal-Mart has also built its reputation by striving to make a difference in the communities it enters and by providing financial and workforce assistance to local organizations and businesses. In addition, Wal-Mart managers have helped shape the corporation into what it is today and they continually work to improve their departments, stores, supercenters, and the company as a whole.

The purpose of this study is to examine Wal-Mart managers' perspectives of strategies that the corporation has implemented in order to Wal-Martize the United States. Two key strategies that have been identified in the literature are glocalization and grobalization – two different forms of globalization. By and large, *glocalization* (a portmanteau of “local” and “globalization”) refers to the strategies that a major corporation uses to cater to local cultures or communities. In other words, it means adapting to local tastes and differences (Robertson, 1994). Conversely, *grobalization* (a portmanteau of “growth” and “globalization”) refers to the uniform or standardized strategies that a major corporation applies across all cultures or communities, without paying attention to local sensitivities (Ritzer, 2008).

The ultimate goal of the researcher was to find commonalities across the participants' responses which provide insight into the true nature of the Wal-Martization of the United States. These commonalities were extracted through themes. Amid the essential questions that this study

has raised (see Appendix A), one question looms large: Do participants tend to favor glocalization and/or globalizaton? Taken as a whole, participants seem to favor glocalization more than globalizaton – yet, they also see some necessity for Wal-Mart to apply globalizing strategies.

Qualitative research methods were used to conduct this study. In-depth qualitative interviewing allowed the researcher to actually comprehend managers' perspectives, gather any additional information needed, and construct a final product that enlightened readers on the dialectical tensions between globalizaton and glocalization for Wal-Mart in the United States. Ten Wal-Mart managers were interviewed using open-ended questions to stimulate thorough responses. These interviews were conducted face-to-face and the researcher tape-recorded each interview to ensure the accuracy of the data. The researcher explored the following research questions:

**RQ1:** What does Wal-Mart communicate with its managers about the globalization of various U.S. communities?

**RQ2:** How does Wal-Mart instruct its managers to develop strategies aimed at globalizaton and/or glocalization?

**RQ3:** What are the patterns toward dialectical tension that emerged across the participants' accounts?

Overall, it was found that Wal-Martization is a process that requires complex strategies and efforts to match the contemporary conditions of globalization. Meeting the needs of local Wal-Mart stores varies from one geographical location to the next. While, by definition, globalization is a reversal of the meaning of glocalization, this study has revealed that part of Wal-Mart's phenomenal success is to be both globalizing and glocalizing. Wal-Mart offers its customers the

opportunity of consuming locally (e.g., Hispanic products, Mediterranean food), globally (e.g., universal U.S. merchandise), or both simultaneously (like products and traditions found in Orlando stores). In this sense, both glocalization and grobalization are effective for the successful Wal-Martization of U.S. communities.

This research is groundbreaking because the perspective of Wal-Mart managers in regards to glocalization and grobalization strategies has never been formally studied before. Furthermore, this study teaches the reader about glocalization and globalization, which are both fairly new concepts. Roland Robertson (1994), a globalization theorist, is credited for coining the term glocalization. Sociologist George Ritzer (2008) is credited for coining the term grobalization. At this point in time, there is limited research on either grobalization or globalization practices in relation to Wal-Mart. This study has heuristic value and is expected to stimulate a great deal of future research.

The next chapter is the literature review. It provides a general description of the Wal-Mart corporation and its expansion across the United States (and a few other countries as well). This literature review goes on to present information about the value of the managers and their responsibilities, as well as the importance of downward and upward communication in the organizational setting. The next section of this literature review explores the dialectical tensions of globalization, before introducing the Wal-Mart's expansion in the United States by comparing glocalization with grobalization. This section begins with a definition of glocalization and moves on to provide a description of some of the glocalization strategies Wal-Mart has used worldwide. After looking at the successful implementation of glocalization strategies worldwide, this literature review proceeds to explore Wal-Mart's glocalization strategies implemented within the United States. Glocalization strategies implemented within the United States can be mainly

attributed to Wal-Mart's establishment of the *Store of the Community* program. This program was developed to cater to the locals in different areas which encompass what it means to employ glocalization strategies.

Glocalization strategies were used to cater to tourists, the Amish, sports fans, higher-class people, diverse populations, senior citizens, families, those who enjoy local products, and Hispanic communities. Subsequently, the section touches on some of the techniques the corporation uses to gather information to better implement the *Store of the Community* program. The next section introduces grobalization, Wal-Martization, and the cathedral of consumption. This is followed by a description of grobalization strategies that have been implemented in the United States. Some of these strategies include uniformity of practices among stores, the "cookie-cutter" store design, and standardization. Then, this literature review goes on to explain some of the impacts of these strategies, which include the disappearance of local products, insensitivity to locals, and corporate sameness. Finally, this section ends with an explanation and examples of the Wal-Mart way attitude that is maintained by the corporation.

The third chapter of this study covers the methods that were used to explore managers' perception of Wal-Mart's expansion in the United States. First, the research questions are introduced, followed by a general description of qualitative interviewing. Then, the researcher's objective as an interviewer was detailed, along with the member checking technique that was implemented. Next, a clear explanation of the participants for the study was included.

The fourth chapter is the analysis and interpretation of the data. All the way through the data reduction process, four key themes surfaced as the most relevant to the initial research questions: (1) Awareness of Glocalization as Key to Success, (2) Grobalization Strategies

Implemented, (3) Centralization as a Pattern of Globalization, and (4) Organizational Socialization.

In the last chapter of this study, a detailed conclusion is provided: (a) the summary of the findings (and, above all, addressing Research Question 1 and Research Question 2 of this thesis project), (b) closing remarks on dialectical tensions between glocalization and globalization (and, in the process, addressing Research Question 3), (c) the limitations of this study, and (d) suggestions for future research.

## CHAPTER TWO: LITERATURE REVIEW

This chapter provides background information on the Wal-Mart corporation – such as the number of stores currently operating and the type of store designs used today. This chapter also touches on how Wal-Mart has contributed to globalization in general and has become so successful over the past 48 years. Next, a focus was placed on Wal-Mart managers and the practices that have been most effectively used by them. Some of these practices include taking action quickly to resolve pressing matters, implementing the open-door policy, demonstrating the importance of basic Wal-Mart values, encouraging teamwork, and living up to their responsibilities.

This literature review focuses on a first major aspect of this study: the concept of glocalization, of which examples of its use by Wal-Mart are provided. Some of these glocalization strategies include gaining stake in existing corporations, building partnerships with local businesses, employing locals, doing business with local farmers and manufacturers. Subsequently, this chapter explains the variety of glocalization strategies implemented by Wal-Mart in order to cater to the locals. Wal-Mart established the *Store of the Community* program with the sole purpose of accomplishing this goal. Through this program, the corporation has been able to specifically cater to tourists, the Amish, sports fans, higher-class people, diverse populations, senior citizens, families, those who enjoy local products, and Hispanic communities.

This literature review also provides an explanation of globalization and its strategies implemented in the United States. First of all, Wal-Mart tends to follow a standardized design for the majority of its stores. The corporation tends to standardize and seems to strive for uniformity across the board. Secondly, the chapter notes that some communities and individuals oppose

Wal-Mart and globalization because of the disappearance of many local businesses and products. Another complaint by local residents, especially those in small towns, is that chain stores (which have often followed Wal-Mart to new locations) have taken away from the character of the towns. Finally, Wal-Mart's "my-way-or-the-highway" attitude, which can be seen frequently but most often during expansion procedures and dealings with suppliers, is a perfect example of the power the corporation actually possesses.

### The Wal-Mart Corporation: A Description

This section covers the globalization of retailing and the fact that Wal-Mart is one of the leaders in this progression. A brief timeline of Wal-Mart's dynamic growth up from its establishment in a small town in Arkansas to the present day as the world's largest retailer is provided. This section also explains what the corporation, executives, and associates do to improve each store and the shopping experience. Finally, also described is what the corporation as a whole is doing to make a difference in the community.

### Wal-Mart: A Classic Success Story

In 1962, Sam Walton opened the first Wal-Mart store in Rogers, Arkansas and officially incorporated as Wal-Mart Stores Inc. seven years later. In 1978, Wal-Mart expanded the stores to include a pharmacy, an auto service center, and a jewelry department. Today, Wal-Mart stores – through discount centers, supercenters, neighborhood markets, marketsides, or supermercados –



can be found in most communities across the United States. There are 8,650 retail units worldwide, and about half of those are located in the United States ([www.walmartstores.com](http://www.walmartstores.com)).

Wal-Mart, the epitome of successful global retailing, is also a prime example of globalization. In simple terms, globalization can be defined as the impact people, products, ideas, services, and information have when they reach across national borders (Bosshart, 2007).

Advances in technology have changed the way people do business and communicate which, in turn, have contributed to the steady increase in globalization. The flow of communication, money, and business has led to more multinational corporations (MNCs) coming into the picture and a stronger sense of interconnectedness among different countries. MNCs tend to be defined as companies that operate in at least one country other than their base country which they manage from (Messenger & Ghosheh, 2010). MNCs are the quintessence of the globalization of retailing. According to Matusitz and Leanza (2009), “The globalization of retailing is the globalization of business practices, products, and corporate culture” (p. 191). As the largest retailer in the world, Wal-Mart is a supreme example of globalization of retail. As Matusitz and Leanza (2009) have suggested, “known all over the world, Wal-Mart stands as a symbol of a successful; global trading company that has taken a single-minded path” (p. 191).

Inside of the United States, currently, there are 750 discount stores, 2,843 supercenters, 607 Sam’s Clubs, 181 neighborhood markets, 4 marketsides, and 2 *supermercados* ([www.walmartstores.com](http://www.walmartstores.com)). The discount store was the first type of Wal-Mart store that was opened and consisted of general merchandise such as houseware, electronics, hardware, sporting goods, and clothing. In 1983, the first Sam’s club, which is a division of incorporated Wal-Mart stores, opened its doors to customers who paid an annual membership fee. This members-only warehouse had more than 2 million members in its first year and currently has more than 47

million members. The Sam's Club is very appealing to small businesses that make up a large percent of the membership because of the opportunity to buy bulk.

The first Wal-Mart supercenter was introduced in 1988 and consisted of general merchandise, groceries, and a variety of specialty centers such as vision, photo studio, pharmacy, automotive, and banking. These stores made it easier than ever to fulfill all of one's shopping needs under one roof. Customers could now shop for groceries and houseware while their car received an oil change at the same location. In 1998, Wal-Mart opened its first neighborhood market which was a more convenient stop for customers than the full-blown superstore. This store consists of a grocery section, drive-up pharmacy, household items, photo center, pet supplies, bakery, and deli. Ten years later, marketsides were introduced with the focus being freshness and high quality but not high-priced ready-made meals.

In 2000, Wal-Mart introduced another form of retailing outlet that could reach farther – its virtual store at [www.walmart.com](http://www.walmart.com). Now, customers had access not only to Wal-Mart merchandise at their neighborhood store but from their own home computer. According to [www.walmartstores.com](http://www.walmartstores.com), “Walmart.com features more than 1,000,000 products, plus easy-to-use music downloads and digital one-hour photo services. And, we're adding more great products every day.” Wal-Mart frequently offers special prices on items purchased online as an extra incentive to buy. Many people are discouraged by high shipping costs on a number of online stores but walmart.com provides free shipping on most products with the site to store shipping option. The same year, Sam's Club also introduced an online shopping option but with a different spin on it. The online store offers click 'n' pull; this allows shoppers to select what items they would like to purchase from their local store and their order is actually pulled from the selves, boxed, and ready for pick up the next day.

In 2009, *Supermercado de Wal-Mart* was launched to see how well the corporation could cater to the Hispanic market. The store is comparable to a neighborhood market store but is decorated in ethnic colors. Signs are displayed in Spanish, most employees are bilingual, and products are directed to attract Latinos.

### Making a Difference in the Store

Wal-Mart executives strive to make their stores a better place for both their associates and customers. This is no easy task since, according to the Wal-Mart website, [www.walmartfacts.com](http://www.walmartfacts.com),

Wal-Mart serves customers and members more than 200 million times per week at more than 8,650 retail units under 53 different banners in 15 countries. With fiscal year 2010 sales of \$405 billion, Wal-Mart employs more than 2.1 million associates worldwide. Nevertheless, executives work hard to visit all sites annually and even provide associates with the opportunity to complete opinion surveys. These site visits and surveys help obtain new ideas and suggestions on how to make the Wal-Mart working and shopping experience better. In each country, Wal-Mart uses different strategies to find ways to best serve the employee and customer. One such example is the website [www.Your.Asda.com](http://www.Your.Asda.com) that Wal-Mart created in the United Kingdom. This site gives customers a tool to provide the company with feedback and maintain a dialogue between the corporation and its customers. Another example is that in the United States; Wal-Mart employees have access to [www.mywalmart.com](http://www.mywalmart.com), which is described on the site as “a place to connect with associates, share stories, and get resources that help you make a difference in your community.”

## Making a Difference in the Community

The ability Wal-Mart has to make a difference in the community is unparalleled and its active involvement is well known. According to [www.Walmart.com](http://www.Walmart.com),

In 2008, Wal-Mart Stores, Inc. and its Foundation gave \$378 million in cash and in-kind donations to benefit more than 4,000 U.S. communities. That is more than 7 million per week and an increase of \$82 million over giving in 2007. Additionally, Wal-Mart customers and associates donated \$106 million through individual contributions and company-sponsored fundraisers around the world, bringing total 2008 giving to nearly \$530 million.

Not only does Wal-Mart give wealth and resources to a multitude of causes; it also gives additional human resources such as sending employees to volunteer at food banks, hospitals, schools, parks, thrift stores, and the Habitat for Humanity organization. The majority of the Wal-Mart Foundation's contributions are directed toward education, environmental sustainability, health, workforce, and economic development. The Wal-Mart Foundation has been able to make a huge impact by providing job skill training to people suffering from these poor economic times. In just one year, Wal-Mart distributed more than \$6 million (in grant money) to programs which helped people (who had been laid off or were unemployed) expand their skill set. The Wal-Mart corporation utilizes *VolunteerMatch*, a tool that helps both customers and employees find a volunteer opportunity in their area. *VolunteerMatch* aligns with their interests and even tracks their hours.

## Wal-Mart Managers

This section covers basic Wal-Mart values that are instilled in all employees from executives to store associates. The section explains a number of the responsibilities that are required of Wal-Mart managers of any level. The section also describes some of the challenges that managers face and methods they use to overcome them. Finally, the section sheds light on how managers deal with morale issues and attempt at stimulating teamwork.

Wal-Mart managers make every effort to ensure their associates are knowledgeable about protocols so that, when a problem arises, they can first attempt to handle it on their own. For instance, Wal-Mart managers and associates are given a fair degree of discretion. During Katrina, they were instructed and expected to make decisions “above their level” without prior approval (Shughart, 2006). The corporation does its best to prepare employees for chaotic times which make these situations run as smoothly as possible. Besides, Wal-Mart has a powerful organizational culture where its essential philosophical principles are transmitted to managers and associates from the first day they join the company (Vedder & Cox, 2006).

Wal-Mart has been built on three basic values instilled by the founder Sam Walton. These values are respect for the individual, service to the customers, and striving for excellence. When employees are encouraged to live up to these values, each store becomes a better place. According to Bergdahl (2004),

Wal-Mart’s cultural values and beliefs are reinforced through management training provided at the company’s Walton Institute of Retailing. Cultural integration and buy-in by its managers are so important that all new managers are required to attend a weeklong

cultural orientation and indoctrination session held at the University of Arkansas at Fayetteville (p. 65).

The pressure to be a successful manager can be difficult to handle and hard to find a balance that works best for the corporation, the manager, and the associates. As Bergdahl (2004) contends, as a manager, if one achieved key financial goals for his or her store to the detriment of the team's morale, he or she may get demoted or fired. Conversely, even with the best morale, the manager must meet quotas and benchmarks, or risk being demoted or fired.

Many Wal-Mart managers have found that the open-door policy is one of the best ways to keep morale up (Bradley & Ghemawat, 1996). This policy encourages associates to approach management with concerns, ideas, and even requests for advice or assistance. Associates can rest assured that their voice will be heard and assessed in a fair manner. In addition, managers are required to work out on the floor with their employees rather than hide in an office all day long. This helps managers get a better understanding of the needs of their employees and what they have to deal with every day, while stimulating teamwork.

To be a productive manager, it takes a great deal of hard work and many long hours working nights, weekends, and even holidays. Nevertheless, Bianco (2006) claims that Wal-Mart intentionally under-staffs its stores, which makes managers realize that tasks get accomplished one way or another – provided that it does not cause non-salaried workers to rack up overtime. Since a manager is on salary, he or she does not receive overtime pay for working more than 40 hours per week. According to Bergdahl (2004), “Wal-Mart has complete disdain for wasting money, which is how the use of overtime is perceived. It's also a black mark on the record of any manager who can't manage the work without the expenditure of overtime” (p. 125). A strategy managers frequently use to avoid overtime is to require assistant managers to work once

associates have reached the maximum number of hours they can without being paid overtime. This strategy is employed because assistant managers are not eligible for overtime pay since they are on salary. This means that assistant managers can be required to work in place of associates during busy times and it will not cost the company additional funding (Bianco, 2006). This goes to show that the common misperception that all managers do is watch over the employees and only intervene in extreme situations is far from true in a Wal-Mart store.

It is required that managers frequently put in more hours and take on more responsibility than associates, but they are paid a considerably higher salary. According to Seligman (2006), “on average, male store managers in 2001 made \$105,682; co-managers \$59,535; and assistant managers \$39,790. On the other hand, the average sales associate made only \$16,526 and cashiers a mere \$14,525” (p. 94). Some believe that the difference in pay seems unfair but if an associate works hard for the company they have a high chance of being promoted to a higher paying job. For instance, “more than 70 percent of Club management was promoted from hourly positions” ([www.Samsclub.com](http://www.Samsclub.com)).

Wal-Mart employees have the ability to be promoted even higher than a department manager if they work hard and exemplify the qualities of an effective manager. The reason is that over 50 percent of its store managers are internally promoted. Most employees who rise to fill management positions enjoy the freedoms that come with the job (Rugman & Girod, 2003). Wal-Mart has encouraged its employees to display creativity, initiative, and a strong effort. Store managers have been known to display all of these through their merchandising and display ideas which often reflect their entrepreneurial attitudes. The ability to be creative in the workplace can spark new and exciting ways to meet quotas. Furthermore, Wal-Mart managers have a considerable amount of autonomy when it comes to the practices of their store (Rugman &

Girod, 2003). Management has control of aspects of the work environment that many do not even consider. For instance, “the manager may also have more prerogatives and incentives to determine working conditions at the establishment level” (Christopherson, 2006, p. 268).

Managers are also allowed to use their own discretion on how to discipline an employee when he or she steps out of line. The most commonly used practices are written or oral reprimands. In more severe situations, “decision making days” are implemented to give the employee an opportunity to present a case why they should not be let go. Once the manager listens to the case, he or she decides whether firing the employee is the most appropriate solution. The authority that managers exercise should not cross set boundaries. After all, the legacy of Sam Walton is a unique corporate culture – the Wal-Mart Way – where managers perform servant leadership (Walton & Huey, 1993). Servant leadership implies that the manager is a keeper, a guardian, or a caretaker. By the same token, every employee is known as an associate (Chalofsky, 2010).

### Downward and Upward Communication

Communication can be characterized as the glue holding a channel of distribution together. From a managerial perspective, the role of communication in retail is an important matter (Mohr & Nevin, 1990). One communication strategy is downward communication, a process whereby persuasive information is transmitted from the top brass to store managers and lower-level managers (Frazier & Summers, 1984) and, consequently, programs are coordinated (Guiltinan, Rejab, & Rodgers, 1980). Downward communication includes several categories of messages: (1) instructions about tasks, (2) job rationales, (3) message on procedures and



practices, and (4) indoctrination messages. Indoctrination messages aim at conveying the organization's cultural postulations (and beliefs) and develop employee identification (Cheney, Christensen, Zorn, & Ganesh, 2010).

Naturally, the reverse of downward communication is upward communication. Upward communication refers to the process of information stemming from lower levels of the pyramid to higher levels (Atwater & Waldman, 2007). Communication has, as its goal, to exchange ideas and information from one individual to another. From this vantage point, upward communication allows subordinates' feedback to be recognized by superiors and makes sure there is some flexibility of communication flowing between the ranks (Green & Knippen, 1999).

### Dialectical Tensions in Globalization

In the 1990s, the study of globalization drew many theorists' increasing attention (Featherstone, 1990, 1991; Friedman, 1990; Robertson, 1991, 1992). Conceptually, globalization is perceived to be both a frame of reference and an emerging paradigm. Featherstone and Lash (1995) corroborate this observation when they write that, in the early 1990s, globalization became an increasingly dominant paradigm in the human sciences. For Robertson (1992), globalization is not just a phenomenon in which societies, regions, and cultural life are fused together in diverse problematic ways "but also of this occurring with increasing intensity inside nationally constituted societies" (p. 104). Globalization, according to Robertson (1992), refers to processes of relativization which suggest ways in which "globalization proceeds, challenges are increasingly presented to the stability of particular perspectives on, and collective and individual participation in, the overall globalization process" (p. 29).

This section describes dialectical tensions and applies them to the relatively new concepts of glocalization and globalizaton. Too, the author provides a definition of glocalization, then moves on to give examples of glocalization strategies used worldwide and in the United States by Wal-Mart. The section also offers a definition of globalizaton and how globalizaton strategies been implemented in the United States.

### Description of Dialectical Tensions

For about thirty years, communication scholars have used dialectical theory to examine various human practices (Altman, Vinsel, & Brown, 1981; Baxter & Montgomery, 1996; Conville, 1983; Rawlins, 1992). Dialectical analysis stems from systems theory and the writings of Georg Hegel (Littlejohn, 1998). Dialectics focuses on contradictions or the methods by which oppositional forces produce situations that are “both-and” or “either-or” (Putnam, 2004). In other words, dialectics posits that tensions exist in every system and generate turning points when an opposing force prevails (Limnatis, 2010). These contradictions appear from primary contradictions that characterize most relations (i.e., both human and international relations). Examples of such contradictions are “autonomy vs. control,” “cooperation vs. competition,” “openness vs. closedness,” “public vs. private,” and “independence vs. dependence” (Putnam, 2004).

In line with these contentions, dialectics helps understand the way things are and how they change. Three principles are essential in dialectics: (1) everything is composed of opposites, (2) gradual changes create turning points, and (3) changes move in spirals, not circles (de Rond & Bouchikhi, 2004). As this study will show, when analyzing dialectical tensions, the researcher

came to the conclusion that some poles come to dominate their counterparts – as demonstrated by the fact that Wal-Mart managers sometimes attempt to decrease or intensify such tensions (de Rond & Bouchikhi, 2004).

### Dialectical Tensions between Glocalization and Globalization

One way to describe the intricacies of interdependence in globalization is to concentrate on dialectical tensions (Jones, 1994). The dialectical tensions between glocalization and globalization may be the essential dialectic of global and intercultural dynamics currently happening. These opposing forces each have proponents. These tensions can be associated to (although not reduced to) tensions between desires to keep local cultures (with their traditions and values) and the growing impositions of globalization (Williams, 2002). In essence, the dialectical tension in globalization is a tension “between the forces of global modernism and local preservation” (p. 2). Existing drifts toward globalization suggest that, increasingly, individuals are getting exposed to different cultural practices throughout their lives. Being exposed to a multinational corporation (MNC) can contest current cultural beliefs and the manners in which humans use communication to deal with cultural similarity and difference (Erbert, Perez, & Gareis, 2003). According to Haslett (1993), “culture, by definition, is a shared consensual way of life, and that sharing and consensus are made possible only through communication” (p. 20). Glocalization and globalization are two of the most recent paradigms that typify the aforementioned situations.

The fluid dialectical tensions between glocalization and globalization can be best demonstrated by Hall’s (1991) conception of local and global. As Hall (1991) remarks, there is

always a continuous dialectical tension between the local and the global, and the two are constantly interpreting each other. In addition, the dialectical tensions between the global and the local can also be exemplified by Hannerz's (1990) observation that standardization happens through the growing interconnection of varied local cultures. Appadurai (1990) contends that the key problem of globalization is the dialectic tension between cultural homogenization and cultural adaptation.

In their study on international collaborations, de Rond and Bouchikhi (2004) examined the dialectical tension between autonomy and control. Control refers to leading or directing the process, while autonomy reflects following one's own lead. Control strongly pertains to matters of what constitutes authority and which person gets authority over what (Putnam, 2004).

Likewise, Lin, Wang, Akamatsu, and Riazi (2002) looked at the dialectical tension between kowtowing and imposing. To kowtow means to submit – in this case, it means submitting to the will of customers who live within our own culture. A third example of dialectical tensions in globalization is the one between diversity and non-diversity. In this respect, Robertson (1991) asserts that cultural diversity – i.e., ideas of culture, identity, etc. – has become increasingly problematic. This is due to the influence of the globalization, with its manifestation of large flows of human migrations (e.g., to the U.S.), the global economy, and the global cultural life.

### Definition of Glocalization

There are several different components to the theory of glocalization. First of all, since the world is so diverse, glocalization is sensitive to the many variations that can be found between different parts of the world. Secondly, glocalization places value on the local – whether

it is local entities, people, or cultures (Robertson, 2001). Glocalization often battles ideas of standardization because of the importance the theory places on the local. According to Ritzer (2008), “the glocal realities in one part of the world are likely to be quite different from such realities in other parts” (p. 166). In other words, glocalization can affect some areas differently than others.

When Wal-Mart decides to enter a new territory, whether it is a different neighborhood in the United States or a different country, the corporation faces both strong support and opposition. Glocalization even means hiring employees speaking various languages – not only to cater to foreign cultures, but also to “kowtow” to customers who live within our own culture (Lin et al., 2002). However, by implementing glocalization strategies, Wal-Mart has made attempts to gain more support from locals rather than opposition. Before looking at the various glocalization strategies that Wal-Mart has adopted in the United States, let us examine some fundamental examples of Wal-Mart’s glocalization strategies worldwide.

### Wal-Mart’s Glocalization Strategies Worldwide

Wal-Mart’s steady international growth continued into the next millennium. In 2002, Wal-Mart’s growth in Japan began with stake in one of the largest supermarkets in the country. Today, there are 371 Wal-Mart retail units that employ 25,139 associates. Wal-Mart did not emerge in Central America until 2005 but now has 420 stores among Guatemala, El Salvador, Honduras, Nicaragua and Costa Rica in five different layout designs (an indicator of glocalization). The breakdown of retail units is 145 in Guatemala, 70 in El Salvador, 47 in Honduras, 46 in Nicaragua, and 149 in Costa Rica. Wal-Mart first opened in Chile in 2009 and

already has 254 retail units and 35,494 associates due to the corporation's gain of a stake in one of Chile's biggest retailers. That same year, Wal-Mart implemented a glocalization strategy by forming a partnership with a business group in India and by May of 2009, the first store was opened jointly ([www.walmartstores.com](http://www.walmartstores.com)).

Wal-Mart's presence in China started with a supercenter and Sam's Club in 1996. Currently, there are 283 Wal-Mart stores within the country. According to Walmart.com, "Walmart China currently serves more than 7 million customers weekly in 87 cities." Wal-Mart has provided numerous job opportunities and local economic development to China. In China specifically, a number of glocalization strategies have been implemented. For instance "95% of merchandising sold at Wal-Mart China stores are local products by which Wal-Mart has established business relations with nearly 20,000 suppliers" ([www.walmartstores.com](http://www.walmartstores.com)).

In Canada, Wal-Mart is known for a glocalization strategy in which it organizes a supplier fair each year. The fair provides Canadian product manufacturers and suppliers an opportunity to get information about doing business with the corporation. On [www.walmartstores.com](http://www.walmartstores.com), it was noted that "we currently do business with more than 6,000 Canadian suppliers to whom we pay more than \$11 billion annually and we have created hundreds of thousands of store and construction jobs since Wal-Mart Canada was founded."

In 1991, Wal-Mart opened its first store outside of the United States, Sam's Club, in Mexico which led to the development of Wal-Mart International just two years later. However, when Wal-Mart executives first set foot outside the United States, they quickly noticed that the same practices used with their home country would not find great success abroad. There have been a number of documented cases of Wal-Mart managers incorrectly reacting and adapting to international markets. These cases showed executives and managers that adopting new strategies

was necessary to be successful abroad (Palmer, 2005). This sparked glocalization practices abroad in which the routine was to study the local culture and allow more flexibility in store design and product mix. Thereby, Wal-Mart increased its popularity beyond U.S. borders.

Currently, Wal-Mart has 1,472 retail units with more than 168,000 associates thriving in Mexico. Wal-Mart crossed the United States border into Canada in 1994 when the corporation bought out 122 “Woolco” stores. There are 317 Wal-Mart retail units throughout Canada.

Glocalization practices were evident when Wal-Mart de Mexico gave financial support to family farms and orchards which are the source of food and income to thousands of people

([www.walmartstores.com](http://www.walmartstores.com)).

Wal-Mart “purchased more than \$151,000 in products from 62 communities that we sold in 64 Supermarkets and 28 Wal-Mart supercenters, benefitting 5,655 indigenous people”

([www.walmartstores.com](http://www.walmartstores.com)). In 1995, Wal-Mart also entered Brazil with the opening of several supercenters and Sam’s Clubs stores. Currently, Wal-Mart has 436 retail units in 18 states and the Federal District with the majority being similar to the American neighborhood market design which they call Todo Dia. Todo Dia exemplifies glocalization in the fact that this store caters specifically to Brazilians. Furthermore, Wal-Mart in Brazil was able to expand quickly due to their acquisition of more than 150 “Bompreço” and “Sonae” stores. Wal-Mart Brazil has given local companies an opportunity that may not have been available otherwise, to export their products to other countries such as England, the United States, and Costa Rica. Some of these products include, candy, linens, shoes, and furniture. Wal-Mart also works with farmers to open new markets for their items which Wal-Mart can, in turn, purchase to sell in its stores. This is beneficial to Wal-Mart, its customers, the economy, and the farmers.

Wal-Mart spread to Argentina in 1995 with the opening of a Sam's Club. Today, there are 44 retail units within the country and 9,028 associates are employed. Globalization practices were used by Wal-Mart Argentina to develop countless partnerships with local companies in order to sell its products in stores and meet demands of the communities. In Central America, Wal-Mart has set several programs that benefit local economies into motion. For instance, the corporation worked with farmers to grow better quality produce at a competitive price that could be found in not only Wal-Mart stores but others as well. Similarly, Wal-Mart Japan obtains the majority of its fresh produce from local growers.

Wal-Mart India established the first special skills training center in the country which gives trainees the opportunity to learn different skills required for a successful career in retailing. Furthermore, in the stores "over 90% of goods and services are being sourced locally; thereby helping keep costs to a minimum, adding to the growth of the local economy and creating job opportunities" ([www.walmartstores.com](http://www.walmartstores.com)).

In 1999, Wal-Mart took over a supermarket chain in the United Kingdom called ASDA (Matusitz & Forrester, 2009). Currently, Wal-Mart has 371 retail units across the United Kingdom. According to Seyfang (2008), ASDA is creating thousands of new positions and has made it a point to fill nearly half of these positions with individuals who have been unemployed for more than half a year. In addition, Wal-Mart in the U.K. plans to give more positions to people with disabilities and health conditions that may prevent them from finding a stable job easily. This kind of promise to help the people in the community is not common among many retailers.



Because Wal-Mart's glocalization strategies were successful worldwide, why would they not be efficient in the United States? So, let us have a look at the glocalization strategies Wal-Mart has implemented in the United States.

### Wal-Mart's Glocalization Strategies in the United States

Glocalization strategies are frequently used by Wal-Mart to cater to specific groups of people and communities as a whole. Wal-Mart noted early on that different areas had different needs. Wal-Mart opened its first Sam's Club with the community needs in mind. According to Wal-Mart's Chief Executive Officer David Glass, as cited by Vance and Scott (1994),

Wal-Mart and Sam's, were designed for different markets- Wal-Mart for small towns and Sam's for cities. While both Sam's and conventional Wal-Marts could be found in the same markets, sometimes even adjacent to each other, Glass insisted that they did not compete with each other. Instead, he said, they actually complemented each other because of their different market strategies and customer bases (p.119).

Over the years, Wal-Mart has slowly integrated glocalization practices into its plan by working to meet the varying product demands in different areas. The corporation had realized adjustments needed to be made to its traditional stores in order to meet these demands. For instance, a new and larger store was designed for larger U.S. metropolitan areas in the late 1980s. This store design featured a more diverse and competitive merchandise mix than was previously used in other areas (Graff, 1998).

## Store of the Community Approach

Wal-Mart realized that it needed to work harder to cater to the locals after an incident in Cleveland Heights, Ohio which led to the introduction of the *Store of the Community* program. The corporation built a conventional Wal-Mart with the standard line of products typically carried but the area population consisted of mostly African-Americans and Jewish people. Therefore, Wal-Mart failed to carry many of the essentials for African-Americans and Jewish people. For example, at this time, the store did not carry any kosher foods or African-American specific products (Marquard & Birchard, 2007). The *Store of the Community* program implemented by Wal-Mart headquarters is a perfect example of a glocalization strategy that was exceptionally sensitive to the need of the local community Wal-Mart occupies. Wal-Mart CEO, Scott (2006), made a statement about the *Store of the Community* program in a speech to the Newspaper Association of America,

We are finding that we need to adapt to America's changing demographics. Our population is aging and becoming more diverse. We are appealing to older Americans by doing things like installing drive-through at our pharmacies and keeping them open longer. And we are learning how to stock merchandise that appeals to the Latino community, for example, by studying trends at our stores in Central America (p. 4).

This type of glocalization program has brought about a new philosophy for Wal-Mart and has affected many aspects of the corporation and its store such as layout, construction, products, and languages used. According to Petrovic and Hamilton (2006), "Wal-Mart not only manages hundreds of millions of items in its 5,500 stores around the world, but also adjusts the inventory

levels of these products according to local demand forecasts” (p. 133). This would not have been possible if the corporation had not put such a great deal of time into observing, researching, and collecting data on the communities they serve and plan to serve in order to do this more effectively.

According to [www.walmartstores.com](http://www.walmartstores.com), “by offering the right product, at the right place, at the right price and at the right time, we remain relevant to our customers and meet the demands of the diverse communities we serve.” Through this *Store of the Community* program, the departments that customers tend to shop most frequently have been determined and the store has been laid out accordingly. This layout has been determined on a store-by-store basis, not a general “cookie-cutter” layout for all stores based on national averages.

### Tourists

In recent years, Wal-Mart has introduced many features to its existing and new stores that help them better cater to the locals in a variety of areas. In Florida, an Orlando supercenter has area theme park tickets for purchase as well as numerous Disney souvenirs. The store’s automotive center is also equipped to service recreational vehicles which are a common sight in this area. British food, Hispanic foods, and merchandise such as music CDs can be found throughout the store. This gives tourists a taste of home which they often desire and gives curious residents a taste of different cultures. A Wal-Mart in Fort Myers, which is a popular beach destination, has taken this into consideration by including an easy-to-access beach section with a large selection of beach items such as toys, sunscreen, tanning oil, bathing suits, clothes, and towels. The Park Rapids store in Minnesota has a larger than normal sporting goods

department to accommodate the high draw to the area for its outdoor recreation ([www.walmartstores.com](http://www.walmartstores.com)).

### The Amish

The Ashland, Ohio Wal-Mart has been designed to cater to the needs of the Amish who live in that area. This store is an example of just how closely the corporation has followed glocalization practices. This Wal-Mart has hitching posts with water available for horses used by the Amish to pull their buggies. The store has also plans to provide some type of shelter for the hitching posts and a cobblestone path. Inside the store, one will find that both the fabric and canned goods sections have been enlarged ([www.walmartstores.com](http://www.walmartstores.com)).

### Universities & Sports

Other glocalization practices that Wal-Mart uses to provide what locals want can be seen in college towns such as that of Lansing, Michigan which is the home of Michigan State University. This store offers a selection of Michigan State University fan supplies so locals and students can show their support for the school. This same approach of Wal-Mart stores stocking university fan gear is taken in other university towns across the nation. Most of these stores also offer a special section of the store to showcase items for local and national sporting events or even holiday items. Wal-Mart stores often cater to the locals by including sports departments that meet the demand for specific games and equipment that are extremely well-liked by residents in

the surrounding areas such as the corporation has done in the Landover Hills, Maryland Wal-Mart.

### Upscale Districts

The Wal-Mart stores in Rochester Hills, Michigan and Vestavia Hills, Alabama have been designed to include a sushi bar in the store to meet high demand in those areas. In some communities, Wal-Mart discovered that offering a section with gourmet meats and cheeses accompanied by wines and specialty beers served its customers well, such is the case at the Holly Springs, North Carolina Wal-Mart ([www.walmartstores.com](http://www.walmartstores.com)). Vedder and Cox (2006) made a statement about Wal-Mart that “in 2005 began what has been termed a ‘big makeover,’ introducing more upscale merchandise in an attempt to reach out to more middle-and upper-income shoppers, a move that has both considerable potential and considerable risk” (p. 63). Catering to a more upscale crowd is one of the corporation’s newest glocalization strategies. In 2006, Wal-Mart opened a supercenter in Plano, Texas used for testing new ideas of how to appeal to the upscale shopper. The new supercenter was ideal for testing store features and strategies to enhance the customer shopping experience.

This fully operational store is a laboratory for testing new products and initiatives. If a newly tested idea is unsuccessful, it will be dropped but if it is successful it will be implemented in other stores. The clothing section is more spacious and even has its own checkout area so customers no longer have to wait in the main lines at the front of the store to make their clothing purchases. The shopping experience is more pleasurable with less noisy distraction such as frequent intercom speaker announcements throughout the store. An upscale wine section that is

considerably larger than the standard Wal-Mart wine selection is featured. To accompany the wines, an expanded assortment of gourmet cheeses is offered. The store features a wide array of natural food products and even has coffee shop on the premises in which customers can access free wi-fi (<http://walmartstores.com/pressroom/news/5679.aspx>).

### Diverse Populations

In a number of areas, it was challenging for Wal-Mart to cater to the locals when the area was found to be particularly diverse and rigorous glocalization strategies had to be implemented. This was the case with a store in Atlanta but the corporation worked to overcome the challenge by working closely with local organizations to ensure the different group's needs were met inside the store. The input received from locals prompted the inclusion of Caribbean, Asian, European, Hispanic, and kosher goods in this store. According to [www.walmartstores.com](http://www.walmartstores.com), "In addition, the new store boasts of a selection of more than 500 organic food items and an 82-foot seafood counter with fresh seafood -- one of the largest in the entire company" (<http://walmartstores.com/pressroom/news/6193.aspx>). In west Sacramento, there is also a diverse area; among the supercenter employees, about twenty different languages are spoken and Hispanic, Asian, and Eastern European foods can be found on the shelves.

The Miami Gardens Wal-Mart carries Caribbean, Jamaican, and Spanish foods due to the diversity of Miami. In the Penitas, Texas Wal-Mart store, measures have been taken to offer what locals want. This store prepares freshly baked tortillas, chips, and traditional Mexican breads. The stores produce department has included additional tropical fruits, chilies, and spices. The Richmond, CA Wal-Mart has worked hard to fulfill the needs of the surrounding diverse

area as well by including Hispanic food, Asian food, appealing clothing choices specific to that area, and a variety of ethnic hair products. Wal-Mart in Edison, NJ also reflects the desires of the community with its inclusion of an Asian and an Indian food section. Many other Wal-Mart stores in diverse areas of the nation tend to accommodate for this by including an international aisle ([www.walmartstores.com](http://www.walmartstores.com)).

### Senior Citizens

The supercenter located in The Villages, Florida accommodates the needs of the high population of senior citizens in the vicinity through glocalization strategies. First of all, a drive-thru pharmacy helps many older people who have a hard time walking or standing in line for even a short period of time avoid this altogether when having a prescription filled. Second, when people begin to age, their vision and hearing abilities often deteriorate over the years. Therefore, both a hearing and vision center are located on the premises. Third, since golf carts are common use of transportation in The Villages, the store provides easy access for carts to the store.

### Families & Children

Certain communities have higher rates of family development and Wal-Mart has designed the store to reflect this need. The Garland, Texas Wal-Mart attempts to meet local demands with the addition of a special children's department with a collection of adolescence home supplies such as furniture, linens, bedroom items, clothing, and accessories. Also, the Kearny, New Jersey Wal-Mart has an oversized infants section which provides parents with a

selection of baby supplies and clothing. Wal-Mart is currently studying how to appeal more to women since they tend to do the majority of the household shopping.

### Local Products and Produce

Numerous Wal-Mart stores across the nation such as the San Luis, Arizona store carry local produce and products which helps support the local economy and gives customers what they have expressed they want. This glocalization strategy has helped to increase the customer base of many stores. The Los Angeles Wal-Mart is another example of a store that carries products from local suppliers, such as El Monterrey Foods, Marquez Brothers, and Romeros Fish. Also, a Charlotte, North Carolina Wal-Mart started to carry a local clothing line that was popular among African Americans who make up a considerable portion of the population.

### Hispanic Communities

Due to the increasing Hispanic population in the United States, the *Store of the Community* program has focused a great deal on this group. One of Wal-Mart's glocalization strategies that proved successful focused exclusively on Hispanic communities. CEO H. Lee Scott (2006a) stated in his speech at Wal-Mart's Second Annual Media Conference,

We have identified about 1,300 stores with a significant Hispanic customer base.

In the stores with a dominant Hispanic customer base, our sales were up more than nine percent last year [after implementation of program]. And right now, Hispanics have a greater affinity for Wal-Mart than any identifiable segment of the U.S. population.



And by 2020, Hispanic buying power is expected to exceed \$2 trillion. Wal-Mart is very well positioned to capture a significant portion of this market (p. 11).

One way Wal-Mart has tried to improve the shopping experience for Hispanics is by bilingual signs in their stores located in heavy Spanish-speaking neighborhoods. Not only are there many people of Hispanic origin in America, but there are also countless people who enjoy Hispanic foods and products. This demand prompted Wal-Mart to include an assortment of these types of items to satisfy this large segment of the population. For instance, the El Paso, Texas Wal-Mart store included a collection of Hispanic foods such as soups, sausages, pastries, and spices. Many other Wal-Mart stores in Hispanic populated areas carry the items listed above and also have rice and beans available for purchase in bulk along with meats ethnically marinated, plantains, and a special selection of products in the health and beauty department. The Dinuba, California supercenter deli even offers taquitos, burritos, and tacos to the customers. “The company also works closely with Wal-Mart de Mexico to provide familiar products to the significant Mexican-American population here, and it prints bilingual monthly circulars” (<http://walmartstores.com/pressroom/news/6709.aspx>).

### Program Information-Gathering Techniques

Each store that has followed the *Store of the Community* program has its own unique way of gathering information about its potential or current customers aside from the techniques used by the corporation. According to the store manager of a Holland, Ohio store, Aimee Chafins, “Our store really is a store of the community. Most of our management team lives within five miles of the store, and this made it easy to identify the needs of this community” (2006). Another

technique used is tracking customer shopping patterns. According to Weiss and Lummins (1995), “more than half of Wal-Mart’s 5,000 vendors get point-of-sale data” (p.18). This allows Wal-Mart to refill the shelves with the products that customers want even faster. Marquard and Birchard (2007) remarked that “its [Wal-Mart’s] information warehouse holds 570 terabytes of data, more than all the fixed pages on the internet. By mining those data, Wal-Mart is able to track a host of consumer buying patterns” (p.24). In using these different information-gathering techniques, the corporation can better implement glocalization practices.

The *Store of the Community* program has influenced not only the interior of a Wal-Mart store but also the appearance on its exterior. This glocalization strategy was implemented because the corporation discovered how important the exterior appearance was to locals who are customers – and also those who are not. Now, Wal-Mart strives to build and remodel its stores to resemble the surrounding landscape. This has brought about a wide array of Wal-Mart exterior designs that are far from their standard image. The Wal-Mart in Tega Cay, South Carolina was build around a park theme which includes gazebos, fountains, benches, and a variety of plants. In contrast, the Wal-Mart store in Triadelphia, West Virginia is a stone building constructed with decorative wooden beams that give the store a completely different look. The Wal-Mart that opened in small town Kilmarnock, Virginia added features to the exterior to help the store blend in with the 1950s design, with its old-style light posts and extensive landscaping and green areas, the exterior of the new supercenter was designed to complement the facades of other buildings in the surrounding business district ([www.walmartstores.com](http://www.walmartstores.com)).

### Definition of Globalization

Globalization is developed on the basis of uniformity, standardization, sameness, dominance, and an aggressive attitude. According to Ritzer (2008), “rather than emphasizing the great diversity among various glocalised locales, globalization lead to the view that the world is growing increasingly similar” (p. 168). Those who oppose the corporation often are in fear of what is known as unstoppable Wal-Martization. In this sense, the Wal-Mart corporation represents the philosophy of “faster, better, cheaper’ and bigger, more global, standardized shopping. Because Wal-Mart can cut prices, it does (Bosshart, 2007). This is simply what globalization entails. For Ritzer and Ryan (2003), globalization implies a global culture or a superculture associated with a nation (especially that of the United States of America). Worldwide, Wal-Mart managers have had a difficult time applying globalization strategies on local communities. Yet, they have seen both success and failure in the United States, as exemplified in this study (see Chapters 4 and 5).

Globalization is the reverse of glocalization in the sense that the objective of globalization is to avoid the intersection of the global and the local, and to avoid reaching unique, tailored outcomes in different geographic areas (Ritzer & Ryan, 2003). Globalization is the idea that a giant corporation is a standardized cathedral of consumption. The term cathedral of consumption was introduced by sociologist George Ritzer in 1999. A cathedral of consumption is exemplified by extraordinary global success that stimulates a consumer religion and excessive consumption. The idea behind a cathedral of consumption is that if a consumer experiences a “spectacle,” he or she will continue to consume and have a strong desire to

increase consumption (Ritzer, 2008). Though people consume certain goods that are necessary, many people, especially Americans, are consumers of products that are not needed. After all, Americans are known for their materialistic nature, and even when it comes to necessities such as food, they are known for their oversized portions and second helpings. Wal-Mart works as a cathedral of consumption to both necessary and unnecessary consumption by its shoppers.

### The Role of Communication in Globalization

Globalization exemplifies the globalization of U.S.-branded products and values. The fact that local cultures get exposed to Wal-Mart's merchandise and commodities affects culture and globalization by means of the introduction of cultural goods and services around the world (Ritzer, 2008). Globalization compels local communities to juggle around with their strategies on how to assimilate their customs and ways of living *vis-à-vis* a convincing global process such as Wal-Martization. In a similar fashion, the cultural and global changes (that globalization entails) are important to theorists in intercultural communication in several ways (Kraidy, 1999). Globalization places particular emphasis on a new supraculture that may yield to "culture shock" in locations where Wal-Mart customs and practices are perceived as radical or are difficult to accept by local individuals, particularly older or the less opened individuals. In these cultural processes, such dislocation forces may widen the generation gaps and the culture-gap syndrome (Brunn, 2006).

The notion of culture, the methods by which cultural and global change are set off by globalizing tendencies, and the function of globalizing forces in defining personal identity are essential matters of discussion for communication scholars. They offer deep-seated assumptions

for our understanding of the processes of intercultural communication. Individuals and societies worldwide are experiencing the Wal-Martization process ever more. This may influence both intercultural communication and globalization scholars to examine what awareness and skills local communities need to have in order to function well in a new overarching culture (i.e., imposed by multinational corporation). For instance, Wal-Mart in Mexico is viewed as an overarching culture in that nation (Whelan, 2008).

### Wal-Mart's Globalization Strategies in the United States

This section describes how Wal-Mart enforces a number of practices uniformly across the United States such as an open-door policy whose objective is to avoid unionization. Secondly, this section covers how the corporation has followed a “cookie-cutter” store design strategy for years and then moves on to cover the standardization of the corporation in more detail. The section explains the impact locals and small towns have felt, such as corporate sameness and the disappearance of local products, due to globalization strategies. Finally, the section explains how the corporation maintains control and power through the Wal-Mart Way.

### Enforcing Practices Uniformly across All U.S. Cultures

From a globalization perspective, Wal-Mart embodies a “my-way-or-the-highway” uniformity of a cathedral of consumption (Ritzer, 2008). An example of Wal-Mart's globalization strategy is its enforcement of the famous bulk-size purchasing, a practice that not all Americans like. Wal-Mart's notorious giant gallon jar of Vlasic pickles is an example to

consider. Not only is the jar the size of a small fish tank (weighing twelve pounds); it is also excessively big to carry with one hand (Fishman, 2006). Yet, it works for Wal-Mart as the corporation set it at a \$2.97, reducing its cost to almost nothing (Marquard, 2006). At less than \$3, the gallon jar of Vlasic pickles constitutes a year's supply of pickles. It may satisfy the cathedral of consumption's hunger for huge volumes, but it became such a "culture shock" after it was introduced to U.S. culture (Brunn, 2006).

Another example of Wal-Mart's forceful standardization is the absence of labor unions inside the corporation across the United States (Matusitz & Leanza, 2009). Labor unions are designed to represent workers and are known for bargaining with employers on behalf of their members. The union will negotiate contracts, wages, hiring and termination protocols, safety regulations, benefits, shift time requirements, and a variety of other general policies. Wal-Mart does not have even one store that is unionized (Spotts & Greenwald, 2005). The Wal-Mart corporation claims that they are not anti-union. They believe that a union is not needed for Wal-Mart and that its employees feel the same way. The corporation feels that its associates do not need representation due to Wal-Mart management's strong open-door policy which serves them ever better than any union could (Reich, 2008).

A union would merely divide the partnership between management and associates ([www.walmart-oregon.com](http://www.walmart-oregon.com)). Some question the claim that the absence of unions is actually better for the associates. Wal-Mart openly expresses the opposition to unions and many believe this opposition is solely driven by the interests of the corporation overall – not the associates' well-being. Wal-Mart is one of the strongest opponents unions face. Yet, if unions are able to penetrate Wal-Mart, much is to be gained. After all, most of the jobs offered at Wal-Mart are not the type that can be easily outsourced. If unions do win this battle, the corporation feels it will

drive up its current operating costs and decrease the flexibility (in managing workers) that is exercised (Maher & Zimmerman, 2009). Wal-Mart will continue to use its influence to fight unions and the fact that it has maintained a union-free corporation for almost half a century is incredible.

### Cookie-Cutter Design

Wal-Mart's original store design was found to be very successful and is a perfect example of globalization. This design did not allow much room for deviation which can account for the reason the corporation did not respond well to those who suggested change (Gondziola, 2005). The mindset of Wal-Mart executives was that they should follow the plan of action which had given them positive results before. Besides, after completing this design and process several times, the corporation knew how to get it done in the most efficient manner. If the store design was changed, then this would be more time-consuming – which would slow its growth process. This is exemplified in the words of founder Sam Walton, (1992): “So for the most part, we just started repeating what worked, stamping out stores cookie-cutter style” (p. 110). Since the strategies implemented in the first few stores seemed to be well liked by customers and proved to be quite profitable, this design became the model for coming stores.

According to Marquard and Birchard (2007), “that Wal-Mart can grow so much every year in both local and national markets stems from its strategy to both grow globally and saturate locally. Sam Walton called it ‘spreading out, then filling in’” (p. 31). This globalization strategy appeared to be effective and was followed for a long period of time without variation. This led to Wal-Mart becoming a common site across the nation. The same exact store design from layout to

product mix was built in neighborhood after neighborhood. This is not to say that the corporation did not put a great deal of effort into determining how this design should be constructed.

However, when they felt the corporation had discovered a design that really worked in their stores, they followed it closely.

According to Warf and Chapman (2006), “The layout of products in Wal-Mart stores, which is almost identical, involves careful product placement and merchandise mix” (p. 169). In providing the same merchandise mix, Wal-Mart ran into problems because the wants and needs of the communities served were not identical but their stores were. After all, the average female shopper at Wal-Mart is size 14, but the corporation had few in this size and an abundance of skinny-leg jeans. Furthermore, one of Wal-Mart’s clothing lines originally excelled in a few hundred stores so it was introduced in more than 1,000 stores. However, it was noticeably unsuccessful (Bianco, Hovanesian, Young, & Gogoi, 2007). Issues such as these were attributed to globalization strategies and gave Wal-Mart headquarters hints that, possibly, the “cookie-cutter” store was not the best design in a changing world.

### Standardization

Wal-Mart’s tendency to standardize every aspect of the corporation was a component of globalization strategies. This enabled them to grow within the United States even faster than most expected. The uniformity across stores was staggering. If one traveled outside one’s home state and happened to walk into a Wal-Mart in a different town, it would be easy to forget one was away from home because it gave them the feeling that they were shopping at their own local store. After all, people seek things that are familiar even when they are simply looking for a store



to shop in (i.e., the familiarity or mere exposure effect). Since chain stores are so prevalent, individuals become dependent on the same quality, services and, of course, prices (Schumer, 2005). So, many travelers felt that the globalization uniformity across regions was an advantage because they already knew the product selection and where those items could be found in the store. This would give travelers more time to do some sightseeing rather than have to stop at several stores in order to find the items they need. On the other hand, travelers who wished to get a feel for the local culture were often disappointed by the sight of a Wal-Mart because this meant that the travelers were more likely to get a taste of home than anything else.

### Local

Globalization makes locals feel cheated by the introduction of a Wal-Mart to their community because this often means the disappearance of a variety of local products that are enjoyed (Matusitz & Forrester, 2009; Matusitz & Leanza, 2009). According to Karjanen (2006), “local firms generate more economic growth per dollar of sales because they usually source more goods and services from local suppliers than do the larger multinationals” (p. 152). Larger corporations such as Wal-Mart are famous for building their inventory from products distributed by large suppliers even when the product is available locally. An example of this is the Clayton, Georgia Wal-Mart, which is less than 10 miles down the road from the Osage Farms – a local favorite. Osage Farms has a huge strawberry field. Yet, in the midst of strawberry season, the nearby Wal-Mart ships in strawberries from California.

Locals have also been faced with other issues besides the diminishing of local products in their area when Wal-Mart opens its doors. According to Warf and Chapman (2006), “as Wal-

Mart has grown and risen to national and international prominence, the corporation, along with individual Wal-Mart retail outlets, has been accused of insensitivity to and disinterest in local concerns” (p. 210). Wal-Mart worked to change this view of insensitivity by implementing the *Store of the Community* program that was mentioned previously. However, John Fleming, Wal-Mart’s marketing executive VP (2006) commented about the *Store of the Community* program: “It’s not like everything’s different. In some instances, the products change only by 2 to 3 percent” (as emphasized by Feigner, 2006). Basically, even when Wal-Mart made attempts to cater to locals, its product mix did not stray far from their standard set of merchandise.

### Corporate Sameness

Many other chain companies made it a habit to follow Wal-Mart into new areas because the large corporation tended to bring business to smaller chains as well, which led even deeper into a trend of standardization and mass production. Standardization and mass production are frequently associated with globalization strategies (Ritzer, 2008). Most chain stores like Wal-Mart are known for following a similar design and approach in each community entered. As Warf and Chapman (2006) remark, “the processes of homogenization and alienation characteristic of mass production and consumption generate inauthentic senses of place that are not personally constructed but passively consumed” (p. 167). As Wal-Mart spread within the United States, the corporation became a way of life for countless Americans who spent a considerable amount of time in the store each week and relied on its low prices to help them put food on the table.

As more people embraced Wal-Mart as a part of their community, the more similar communities became across the nation. The love of the unique slowly began to die and the love of the cheap and convenient dominated. The cultures of different areas within the United States are steadily merging into one uniformed culture. However, some towns have decided to take a stand against companies that erode local cultures. Howlett (2003) gave an example of a historic town who was “trying to battle what Mayor Lynn Johnson calls ‘corporate *sameness*.’ They don't want the big chain stores that have cropped up across America, such as Starbucks, Home Depot and *Wal-Mart*” (p. A4). A town overrun with “corporate sameness” (as many American towns are) loses some of its appeal and seems to lack heart.

### Small Towns

Some areas are putting up a hard fight against big box stores and their globalization practices out of fear that they will lose their small-town charm with the intrusion of a Wal-Mart or other major chain. According to Norman, a leader in anti-Wal-Mart campaigns, Wal-Mart encourages sprawl, drives neighborhood stores into bankruptcy and “blands down” America by morphing towns once known for their regional élan into miles of windowless, concrete walls and parking lots (Macdonald, 2004). Residents of small towns often become alarmed when they receive the news that Wal-Mart's expansion plans include their area. Residents know that their community has a certain character that just would not mesh well with a gruesome Wal-Mart store. However, residents cannot just sit back and hope that Wal-Mart does not come to town, they will eventually have to take a stand against the corporation or it will only be a matter of time before the next Wal-Mart enters their community. After all, as Quinn (2005) puts it,

The sales area of a Wal-Mart is about seventy miles in diameter, and one of Wal-Mart's corporate strategies is to "carpet" the land-essentially, they want every settlement in the entire country to fall within the sales area of at least one Wal-Mart. So it stands to reason that a number of towns will lose commerce to a nearby Wal-Mart without getting much of anything in return (p. 20).

Globalization has helped Wal-Mart spread quickly across the United States and a community without a Wal-Mart is less common than one with a Wal-Mart store. Commercial culture is taking over the diversity that was once found on a town's main street. This overwhelming culture erodes the residents' sense of place and belonging, not to mention their overall well-being. The commercial culture also lets corporate elite dominate communities and steals many people's livelihoods (Simms, 2005). One of the saddest parts of big box stores entering a community with their globalization practices is that local businesses seem to struggle to survive, especially if their products are similar to Wal-Mart's. Local businesses tend to have a more vested interest in the community as a whole since it is owned and operated on a local level.

Furthermore, a number of communities that have put up a fight against the same old big box stores entering their neighborhoods have been successful. This has provided them with an economic edge through their distinctive stores and obvious sense of community (Mitchell, 2003). If a Wal-Mart supercenter is built in a local community in the United States, the chances local businesses will survive greatly decrease. A Harvard University Economics Professor, Rogoff (2006), commented about the disappearance of local businesses, "Yes, to some extent, such is the price of progress. But the loss of aesthetics and community is not easily captured in simple income and price statistics" (p. 1).

Small-town residents who have not been invaded by big-box stores and their globalization frequently have more pride in their communities than residents in cities who have been. The residents have been known to make an effort to get to know one another on a more personal basis rather than getting caught up in the impersonal way of many large corporations. Norman (1994) warns, “you can’t buy rural life style on any Wal-Mart shelf-once you lose it, Wal-Mart can’t sell it back to you. Wal-Mart’s impact on small-town ethos is enormous” (p. 418). When Wal-Mart enters a small town, the effects of globalization are often more severe than most anticipated.

### The Wal-Mart Way

For some time now, the Wal-Mart corporation has formed a globalization attitude of it is “its way or the highway” in many respects. For instance, the corporation places unrelenting pressure on more than 60,000 of its wholesalers in order to drive down costs. Wal-Mart has enhanced the U.S. economic state more than any other corporation (Bianco, 2006). In other words, if manufacturers refuse to meet the low-price demands of Wal-Mart, then the corporation will threaten to take its business elsewhere, which is what manufacturers feared. The manufacturers may have to sell their products at lower-than-planned prices, but they are guaranteed to move a higher-than-normal volume of products through a partnership with Wal-Mart.

Shoppers are drawn to Wal-Mart to take advantage of the lower prices provided through the corporation’s hard bargaining. Wal-Mart has an incredible amount of power over the manufacturers and markets in general. Wal-Mart’s power and strong globalization practices have

given the corporation the capability to create markets to define the shopping environment, allowing them to set standards for countless suppliers and strongly impacting the global market for consumer goods (Petrovic & Hamilton, 2006). The average Wal-Mart shopper does not actually realize how powerful Wal-Mart is or even stops to consider it. Most customers think that Wal-Mart only offers low prices. Despite the fact that some do not acknowledge it, “the Wal-Mart way” dominates. According to a Wal-Mart CEO, Wal-Mart’s culture is very compelling and fundamentally right. It feels like the culture is non-negotiable (Gondziola, 2005). The pockets of Wal-Mart are so deep and their connections are so strong that they can afford to maintain this powerful and seemingly arrogant business attitude.

According to Gondziola, (2005), the essence of Wal-Mart’s culture can be captured in one word: control. The cathedral of consumption has evolved to be the largest retailer in the world. This happened thanks to a process of tightly-managed forceful growth. There are many examples of Wal-Mart’s means of conducting business aggressively, such as forceful expansion or negotiation with vendors, manufacturers, government, and others. For instance, in a negotiation with Baytown/West Chambers County Economic Development Foundation “A high-and-mighty Wal-Mart threatening to pick up its toys and go home if it doesn’t get its way” (Gondziola, 2005, p. 17). Globalization and the corporation’s steady rise helped the corporation develop such an aggressive business attitude.

## CHAPTER THREE: METHODS

The third chapter explains the methods used to explore the dialectical tensions between globalization and glocalization for Wal-Mart in the United States. Ten Wal-Mart managers were interviewed in the Southeastern part of the country. Each interview consisted of a collection of open questions. The goal of the interviews was to gather information on glocalization and globalization practices used by the Wal-Mart Corporation in the United States. This section describes (1) the research questions, (2) qualitative interviewing and what it entails, (3) the objective as a qualitative interviewer, (4) the value of member checking, (5) the reasons explaining why such methodology was selected (as opposed to quantitative research), (6) who the participants were (and how they were recruited), (7) the themes that emerge across the participants' responses, and (8) the interview protocol itself.

### Research Questions

It is the researcher's belief – based on past and current literature – that the Wal-Mart's expansion in the United States happens through glocalization and/or globalization. Therefore, the purpose of this study is to address the three following research questions:

**RQ1:** What does Wal-Mart communicate with its managers about the globalization of various U.S. communities?

**RQ2:** How does Wal-Mart instruct its managers to develop strategies aimed at globalization and/or glocalization?

**RQ3:** What are the patterns toward dialectical tension that emerged across the

participants' accounts?

To extract information from the participants, ten Wal-Mart managers were interviewed face-to-face in the Central Florida area. The method of in-depth interviewing was used, through open-ended questions.

### Qualitative Interviewing

#### General Description

Face-to-face interviewing is a methodological approach using in-depth analysis of a particular setting (Lofland & Lofland, 1995). The analysis of qualitative data consists of dissecting a subject or experience to research its components. As such, the researcher creates a pattern for the whole by linking categories or themes together – connecting the dots (Schwandt, 2001). From this vantage point, meaning is inferred from the data collected during the interviews. Each qualitative interview with the Wal-Mart participants was a conversation – not between “equal” partners, but it was asymmetrical. Part of the reason is that the researcher determined and controlled the situation. For instance, the topics of glocalization and grobalization were introduced to them by the researcher. This is an example of influencing the situation.

The “answers” to the interview questions should be regarded as accounts. An account is a method of describing events through a form of storytelling, with believability. An account is an extended “telling” of some knowledge or past experience (Riessman, 1993). Participants tell about events and memories at their own pace and in their own way. Interviewing is



conversational because accounts are being told in a conversational manner (Wengraf, 2001). Participants used accounts to give explanation for their own actions or actions of others (Rubin & Rubin, 1995). Likewise, an account is the presentation not only of reasons but also of the participant him- or herself.

### The Objective as a Qualitative Interviewer

In order to conduct in-depth interviews, the researcher tends to live within the interview experience, simultaneously taking part in and directing the conversation (King & Horrocks, 2010). The outcome of the interviews hinged upon the researcher's knowledge, understanding, and empathy (as research tool). Reflexivity plays a part at every level of the research process. Because the researcher is a qualitative interviewer, he or she is the research tool – most of what happened in the research mirrored the qualitative interviewer's thinking.

The objective was to reflect on what the participants would tell. To be more precise, after the participants told their accounts of the Wal-Martization of the United States, the researcher critically examined their accounts by “making sense” of them. The researcher looked for themes emerging across the participants' responses (as explained in detail later). Reflexivity means that the researcher is heedful of the various stages that he or she goes through; meticulous attention was constantly paid from the beginning of this long-term project until the very end. As a qualitative interviewer, the researcher had a saturated role, ranging from the broadest perspective of the entire analysis to the smallest focus on the moment of the interview. All are infused by the researcher's own experience of the subject that is under study (Roulston, 2010).

The significance of the participants' accounts was thoroughly tested. Data collection and analysis procedures were documented (with a digital audio-tape recorder). Important steps in the analysis of the accounts include the transcription and analysis/interpretation stages. Transcription involves translating from verbal language, with its own rules, to written language, with another set of rules (Kvale, 1996).

After everything was done, the researcher analyzed and interpreted the data. This means that the researcher made sense of the coherence, logic, and comprehensibility of the participants' accounts in great depth. The researcher moved from the account to the research text: notes and interpretations derived from the field text. The latter was then re-designed as a working interpretive document including the researcher's initial efforts to make sense of what was learned. As explained later, a thematic analysis was conducted, hoping to find patterns emerging across the participants' responses. Finally, a public text was produced for the reader (Denzin & Lincoln, 2003).

The objective was to produce a clear and comprehensible report for readers – both laypersons and scholars alike. Note that the analysis of the accounts in this project is to be distinguished from Labov's and Walestky's (1967) model of narrative analysis. According to Labov and Walestky, narrative analysis is analysis of its clauses, its general structure (i.e., its grammatical consistency, abstract, orientation, evaluation, resolution, and coda), and so forth. However, more than forty years later, other scholars have found new ways of analyzing qualitative data.

## Member Checking

Analyzing participants' accounts constitutes an all-pervading process in the research. The qualitative researcher has to know how to analyze qualitative interview findings; he or she also needs to understand that methods of improving research validity and reliability must be considered. A method of validity and reliability was "member checking," a first step to understand the importance of the validity and reliability of qualitative methods (Kuzel & Like, 1991). Member checking is a method whereby the researcher restates, summarizes, or paraphrases the information gathered from a participant to make sure (i.e., "check") that what was heard or written down during the interview is accurate. Member checking naturally comes after data collection and involves reporting back preliminary findings to participants, asking for essential critiques on the findings, and possibly including commentaries into the findings (Mears, 2009). The researcher engaged in member checking with six participants (out of ten).

## Why Qualitative Interviewing?

Three reasons were identified for using qualitative interviewing instead of quantitative methods. The first reason the methodology is qualitative lies in the fact that, with qualitative interviewing, the researcher could better comprehend each participant's perspective through detailed interviewing (Brenner, Brown, & Canter, 1985). With quantitative methods, on the other hand, the researcher could barely gain his or her perspective because the researcher would fall back on more distant, inferential empirical materials (Denzin & Lincoln, 1998).

The second reason is that interviewing permitted to probe or extract additional information should the participant be unclear when answering questions. Imagine that the Wal-Mart manager does not seem familiar with the jargon or intent of the study. His or her lack of knowledge can be compensated through an informal discussion, generally at the beginning of the interviewing process, in order to determine whether the participant possesses the required knowledge of the subject. To ensure that the participants understand the purpose and jargon of the study, the researcher avoided using the terms *glocalization* and *grobalization* (as these terms are new in the English language). Rather, the researcher used layperson's terms such as *standardization* (for grobalization) and *catering* or *adaptation* (for glocalization). In like manner, during the interviews, concepts such as diversification, cultural adjustment, catering, and fine-tuning were employed when referring to glocalization. Concepts such as uniformity and corporate sameness were employed when referring to grobalization.

The third reason for using qualitative interviewing is that, unlike quantitative research, interviewing is more constructed. While quantitative scholars "leave the field with mountains of empirical materials and then easily write up his or her findings" (Denzin & Lincoln, 1998, p. 29), the qualitative interviewer will first create notes. After each interview is recorded, it is re-created as a file that contains the initial attempts to understand and interpret what the researcher has learned (Brenner, Brown, & Canter, 1985). Ultimately, the researcher creates the end-result (i.e., the text) for the reader. The latter learns from the meticulously reflexive perspective and experience/interpretation of the researcher (Silverman, 1993).

## Participants

The participants in this study were managers working for Wal-Mart. According to Wal-Mart's official website, [www.walmartstores.com](http://www.walmartstores.com), Wal-Mart has three levels of management: (1) assistant manager, (2) co-manager, and (3) store manager. By and large, a Wal-Mart manager is anyone standing at the forefront of retailing. He or she has been assigned large responsibilities and possesses in-depth knowledge of the Wal-Mart Corporation. Although the United States has over 4,000 Wal-Mart stores and roughly 25,000 managers ([www.walmartstores.com](http://www.walmartstores.com)), the researcher had a difficult time finding ten participants. In addition, a few Wal-Mart executives were interviewed. Unlike managers, Wal-Mart executives occupy some of the highest positions within the corporation. They supervise state, national, and international operations and merchandizing processes. The chances of accessing executives were lower than they were for accessing managers, but the researcher tried her best to interview at least two of them.

In order to recruit participants, there were two options: the first option was to make an appointment with Wal-Mart managers or executives directly and ask them if they were willing to participate in the study. The second option was to ask supervisors, employees whose positions or levels were lower, or Wal-Mart store associates if they could provide names of managers or executives who would be available for participating in the study. Once a sufficient number of participants were obtained, the researcher made appointments for conducting interviews and informed each of them about the purpose of the study. Each interview was conducted separately, either in their office or in other places (e.g., in a private room at a school).

Before conducting the interview proper, the researcher showed them the informed consent form from the Institutional Review Board (IRB), instruct them to read it. Participants

were also informed that the interviews would be tape-recorded. If they refused, notes would be simply taken. To insure protection of the participants, the researcher promised them that their names would remain confidential, that they could use a nickname or alias, and that the tapes would be destroyed after the information was transcribed. Lastly, the researcher gave participants her phone and email address as well as the contact information for the professor directing the thesis. The following statement was also included: “You are encouraged to contact the researcher(s) if you have any questions.” If they had any questions about their rights as a research participant, they could contact the University of Central Florida Institutional Review Board. They were given a copy of this information to keep for their records. If they were not given a copy of this consent form, they could request one.

### Themes Emerging across the Participants’ Accounts

An important objective was that the final analysis of the qualitative interviews would produce significant themes emerging across the participants’ accounts. No particular question was favored or asked to solicit these themes. Rather, these themes came out “naturally,” from the stories that the participants told during the interviews. Based on past qualitative studies, the number of themes generally revolves around five. In this analysis, the researcher came up with four themes. Participants’ accounts embodied the richness of the qualitative data gathered – both the significant and particular elements that were detailed, recorded, and verified. Such richness of information allowed patterns (i.e., themes) to emerge which, in turn, facilitated the development of “generalizations” about the dialectical tensions between globalization and glocalization for Wal-Mart in the United States. In qualitative interviewing, “generalizability”

means that the data are reliable and transferable, and that they can be applied to other contexts – i.e., of retailing or globalizing multinational corporations (Oberle, 2002). Through powerful themes, the ultimate objective was that the qualitative results from this project would serve as a strong foundation for future studies on globalization.

## CHAPTER FOUR: DATA AND ANALYSIS

This chapter analyzes, in detail, the stories told by the participants. After recording the interviews with the ten participants, listening thoroughly to the audiotapes, and transcribing each interview on the computer screen, the accounts were printed and color-coded. The researcher created a Microsoft Word spreadsheet of categories, each pointing toward the key data findings relevant to the central themes that emerged from the interviews. Throughout the data reduction process, four key themes surfaced as the most relevant to the initial research questions: (1) Awareness of Glocalization as Key to Success, (2) Globalization Strategies Implemented, (3) Centralization as a Pattern of Globalization, and (4) Organizational Socialization.

### Theme 1: Awareness of Glocalization as Key to Success

During the interview process with Wal-Mart managers, participants alluded to the importance of glocalizing to the local culture in order to achieve successful results. A thread common to the participants' responses is the idea that any gigantic retail chain like Wal-Mart could easily standardize but, nevertheless, would also have to cater to local cultures by showing "a good fit." Analyzing this first theme required many quotes – and, sometimes, extensive explanations. The researcher could have divided this theme into more themes. However, as you will see, all quotes and their subsequent analyses share a solid gist of glocalization in them.

In the first interview recorded in early September 2010, a Wal-Mart district manager in Orlando described the origins of the corporation's attempt at glocalizing:



“Mr. Sam [Walton] started it back in the early 80s by tailoring the stores to the rural community and we got into the bigger cities and the bigger townships and it just followed. He has allowed us to be flexible with our merchandise assortment all throughout. And, so, as we expand, if you’re in New York or in Miami, you’re going to have whatever the customer wants based on that culture where that store is located.”

This excerpt reflects the essence of glocalization (“you’re going to have whatever the customer wants based on that culture where that store is located”). This validates Robertson’s (1994, 2001) belief that the local community will have an influence on the decision-making procedures and strategies of a corporation, even for a giant behemoth like Wal-Mart (whether “you’re in New York or in Miami”). Likewise, each participant noted that Wal-Mart’s employees (at least in Central Florida) are hired directly from the surrounding community and reflect the demographics of the area. As an East Orlando store manager explained,

“I have about five nationalities working here. I do require everyone to speak English. However, you can’t survive without Spanish-speaking associates. Thirty percent are Latin or Spanish mix, there are twelve Filipino associates, and several Germans. Furthermore, everybody knows everybody. You come into Wal-Mart and you will probably see your neighbor there shopping or working.”

Members of the hiring staff and decision makers who represent the areas in which the store is located can make the store more a part of the community. As the participant suggests, it makes customers feel more comfortable shopping there. This reality of hiring employees speaking various languages to cater to the neighborhood goes back to the very definition of glocalization at the beginning of this project: glocalization means to play by the customers’ rules – those who live within our own culture (Lin et al., 2002). Likewise, since the Spanish-speaking population is

significant in Central Florida, another East Orlando general manager explained some steps his Wal-Mart store took to cater to Spanish-speaking customers:

“Our store gears the signage to the Spanish-speaking by including Spanish and English on all of the store signs. Employees who speak Spanish wear tags saying they speak Spanish. This helps customers and other employees know they can get a Spanish-speaking employee to help a customer. Also, we carry a large array of Spanish products and lots of Spanish foods and seasonings.”

Not only does this quote identify the necessity of pleasing customers to such a great extent that nobody would be “left out” (like a duck caring for all its ducklings); this quote also points to a very important matter addressed in the literature review: once Wal-Mart established itself abroad, it learned the valuable lesson that one has to glocalize or one will fail. In this regard, we can briefly look at what a general Wal-Mart store manager stated. According to the participant,

“As Wal-Mart expanded in Central America, the corporation had difficulty plopping down a store. The corporation quickly realized the value of learning about a culture before opening a store. This caused the corporation to see the potential for improving stores domestically as well by understanding the community served.”

This excerpt echoes the reality that Wal-Mart quickly learned the importance of catering to foreign cultures as soon as the corporation expanded operations beyond the borders of the United States. This excerpt also corroborates Palmer’s (2005) writings, when he wrote that Wal-Mart managers had to “glocalize” when they took their first store out of the United States to Mexico in 1991. Since then, principles of glocalization theory have enabled Wal-Mart to boost their profits and enter fifteen countries and cover the United States. Now, let us contemplate what the first participant (the one mentioned the first time) said:

“You need to connect with the customers and the people who are shopping in your area to see what their needs are. This store has connected very well with the community. I mean, there are some people who won’t shop anywhere else. It’s their store, their Wal-Mart. If we see a trend going one way, we will try it and see if it works for us and our customers.”

The emphasis here is on the connection with customers. This opposes the globalizing strategy of a one-size-fits-all model of retail. Rather, “this store has connected very well with the community.” Glocalization can go as far as “kowtowing” to the local culture, rather than “obediently kowtowing to centralized control” (Creeber, 1994, p. 34). Another case in point is found in an interview recorded in mid-September 2010, whereby a Wal-Mart general manager in Orlando explained the glocalization process in detail:

“We do a survey to try to find out what demographics are in the neighborhood and then what we do is take a look at it and we fit the store to the neighborhood. We call that *traiting*. What we do is figure out if there are different kinds of traits. For example, it looks like this store will have a high demographic Hispanic customer base. It’s also a high college student area. So, we build the store to match that in the community. In this particular store, we will have a whole galley of merchandise just dedicated to Hispanic foods. It also translates into apparel and shoes because sometimes the Hispanic customer is a little smaller in stature so the smaller size shoes and the smaller clothing sell better than a normal store. There is something about every single department that has a trait. That tells us if you’re going to get 60 extra feet in this store for Hispanic merchandise versus a store (maybe across town) that doesn’t have Hispanic goods, that store will have something completely different. It has probably allowed us our biggest success – it’s not just cookie cutter. We can expand and grow based on the demographics.”

This long excerpt reflects multiple elements of glocalization. To begin, this quote substantiates Petrovic and Hamilton's (2006) claim that the corporation adjusts the inventory levels of certain products to fit local demands. Secondly, the concept of *traiting*, a concept initially unknown to the researcher, speaks directly to the first theme of this analysis. By and large, *traiting* refers to glocalization through the allocation of more shelf space to a specific product or range of products based on the customer's preferences (Bradley & Ghemawat, 1996). In this quote, *traiting* in this Wal-Mart store is accomplished by offering more Hispanic merchandise (e.g., smaller size shoes, smaller clothing, etc.).

A third element of glocalization is the value placed on location through a meticulous analysis of demographics to "fit" the neighborhood. Location helps Wal-Mart determine what size its store should be – should it be small to medium size? (Mahfouz & Paradice, 2000). In the quote above, the participant alludes directly to this when he says that "you're going to get 60 extra feet in this store for Hispanic merchandise." From that standpoint, Wal-Mart stores catering to Hispanic neighborhoods will not be small in size. A fourth element of glocalization is the idea that "it's not just cookie cutter," as the participant mentioned at the end of his quote. The Wal-Mart store precisely reflects the community around it ("We can expand and grow based on the demographics"). This also corroborates Robertson's (1994, 2001) view that, to some degree, local communities determine the outlook and decision-making processes of retail corporations.

In another interview, a Wal-Mart manager in Central Florida expressed viewpoints about the importance of the role of glocalization for Wal-Mart's success. At some point during the interview, the participant stated that,

"We allow the managers and the district managers to have a say in their trait. We get the demographics, but then they communicate to the headquarters what's working and what's

not. We actually can tell them this is how many feet we should have versus this and they will deliver that package to us. For example, we just put in some over in the Casselberry store. There, we're trying a new category of food, called Mediterranean food, that we just put in a 24-foot set about 3 months ago, and it's doing very well. Somebody just started looking at the demographics of that store and said 'Let's try some Mediterranean food and see what happens.' Sure enough, it's doing very well. We have that autonomy to pull things in and put things out based on what we think is right. Well, we have a complete list of traits."

This participant's awareness of the importance of glocalization as key to success substantiates the realization of it made by the first participant: *traiting* as glocalization. The retail store provides foodstuff and merchandise so that customers will shop for the best value and, above all, for what they want (Dunne & Kahn, 1997). Just look at what this new participant said about the Wal-Mart store in Casselberry: "Somebody just started looking at the demographics of that store and said 'let's try some Mediterranean food and see what happens' Sure enough, it's doing very well." Again, *traiting* systems tailor a store's merchandise presentation to the needs of the local markets (Dunne & Kahn, 1997).

In addition, this participant brings up a concept that the previous participant did not address clearly: the idea of autonomy through glocalization ("We have that autonomy to pull things in and put things out based on what we think is right"). This confirms Rugman and Girod's (2003) belief about Wal-Mart managers having some freedom in the way they "run" their store. As noted by Mahfouz and Paradice (2000), *traiting* has worked well for Wal-Mart. By employing inventory, sales data, and regional customer preferences, the company's store

managers can have more leeway in selecting which products should be displayed. Managers have also more liberty to set prices that live up to local market conditions.

In a different interview, a Wal-Mart general manager in the Orlando area stressed the necessity of providing managers with more flexibility in their decision-making. As the participant stated,

“We have the flexibility to make the decisions on the things we need. For example, it’s so strange to see but this store sells an exorbitant amount of UCF merchandise. I mean I’ve never seen it and this year was even bigger – it’s huge. Then, you go to the Narcoossee store, which is not even 5 or 6 miles away, and it doesn’t sell there. We identify those needs and we put either a full-blown assortment in or not depending on the needs. So, there is a lot of flexibility that the stores have that they can actually execute the plan. I think it’s what’s got us here.”

This notion of flexibility seems to be crucial to the success of catering to local cultures. The participant’s statement that “this store sells an exorbitant amount of UCF merchandise” is a manifestation of Wal-Mart’s managers’ freedom to display UCF products on Wal-Mart’s shelves. This way, college students and UCF fans will be pleased with the “a full blown assortment.” To go even further, this participant thinks that glocalization, through flexibility, is what led certain Wal-Mart stores in Central Florida to be successful (“I think it’s what’s got us here”). The same participant added these statements:

“I have a certain percent of African American shoppers. So, depending on the percent of shoppers (let’s say it 10%), then Wal-Mart has a health & beauty modular, and it has 10% of that business aimed for that African American business. If it’s 30%, then they have a certain modular with 30% Spanish health & beauty aids. Now, if it was 40%, that would

be a modular with 40% Spanish and every modular in here takes that into account. Sporting goods are not affected. It's really prominent in the food side, the health & beauty side, and, sometimes, the pharmacy side. It can really make or break your profit in that department if you don't have it."

By definition, a modular is a model that takes in a certain set of merchandise and tailors it based on the demographics for an area (Jia, 2008). In this quote, the participant hints at the fact that Wal-Mart has the ability to build its store departments to fit the needs of each group and the size of that group that makes up the surrounding community. The participant believes that this globalization strategy of using adaptive modulars is vital to the success of many parts of the store ("It can really make or break your profit in that department if you don't have it").

Wal-Mart's district and store managers do not let the fact that they are part of a multinational corporation (MNC) overwhelm them. The next excerpt, from a local store manager in West Orlando, reveals that, while managers see the big picture (i.e., getting Wal-Mart to earn big profits), a main focus is also on improving communities overall. Even beyond the walls of the store, managers work to see what the community needs and how they can help. Let us analyze what she (that participant) had to say:

"When the economy hit a low in the past twelve months, Wal-Mart went out and bought trucks for a local food bank big enough to hold twelve pallets of merchandise and those trucks now come around to our stores once a week and pick up all our close-dated merchandise and it goes straight to Second Harvest for the community to just pick up."

This confirms the statements mentioned in the literature review about servant leadership – Wal-Mart's involvement in communities across the U.S., and its donations made to benefit these communities. Wal-Mart stores get involved in their communities and try to make a difference.

Furthermore, most of the store managers interviewed are personally involved in – and members of – local groups that are a part of the community such as Nights of Columbus and Little League. The store often makes donations to nonprofit groups and schools. Glocalization, here, translates into a “catering-by-caring” attitude. Local organizations can hold car washes in the parking lot and Wal-Mart will match their profits. This increases the quality of life for people in the area. After all, their slogan is “Save Money Live Better” ([www.walmartstores.com](http://www.walmartstores.com)).

One question – or probe – that was asked of the participants was the following: Does Wal-Mart harm local cultures and communities? Overall, managers thought that, to a certain degree, Wal-Mart improves the communities more than harms them. One Tampa Wal-Mart store manager said the following:

“Harmful? Yes, in the sense that it creates more of a single culture or moving toward single consumer culture. But, I would say that is true about most large corporations such as Best Buy and Target. Besides, Wal-Mart is always trying to carry a variety of products that the community wants and have special sections for other cultures. If anything, Wal-Mart is contributing to the local cultures and promoting them.”

This quote corresponds to the dialectical tension expressed by Howlett (2003) in his perception of MNCs in developed countries. This dialectical tension between globalization and glocalization is the idea that, while corporate sameness (i.e., standardization) can be beneficial to MNCs and, by the same token, harm local communities, there is always a silver lining in every cloud. By this, Howlett (2003) meant that a giant company like Wal-Mart also strives to respond to corporate sameness by attempting to blend in with the community and really become a part of it.



## Theme 2: Globalization Strategies Implemented

The second theme of this thesis addresses the other end of the dialectical tension between glocalization and globalization – that is, the latter. This time, the researcher managed to break down globalization into another theme (which is the third theme, focusing specifically on the centralization aspect of globalization). Though Wal-Mart prides itself on its effort to cater to the local cultures and communities, elements of globalization are apparent in the company's operations. In the first interview in September 2010, a Wal-Mart store manager in Orlando described why elements of globalization began to be enforced more strictly:

“The old way allowed more independence on the part of store managers in terms of layout and product selection. What is happening now is due to some of our executives seeing there was too much diversity and nobody was on the same page. So, now, every week, there is a new playbook drop and corporate says, ‘Ok, here are what the items are and where it goes.’ So, we have had to adjust to that standard. The home office wants to see uniformity in the store. So, when an executive walks in, everyone is on the same page – not doing their own thing. There is some flexibility, but it is limited and can be overruled by the home office and the executives when they tour the store.”

This excerpt is an embodiment of globalization (“there was too much diversity and nobody was on the same page”) and, in like manner, a contestation of glocalization – in this sense, “too much diversity” is a problem. Now, look at the statement within the same quote: “The home office wants to see uniformity in the store.” Reducing diversity and differences among stores, attempting to standardize operations (i.e., “adjust to that standard”), and the desire to see uniformity are all in line with Ritzer's (2008) concept of globalization. That Orlando manager

spices things up even more when she says “When an executive walks in, everyone is on the same page – not doing their own thing.” This statement personifies the core of globalization (“everyone is on the same page”). Another globalization scholar, Sharma (2009), follows the same idea in his writings on the globalization of retail in India (e.g., the retailing corporation “imposes itself” on employees).

Clearly, Wal-Mart’s globalization practices attempt to maintain a level of uniformity across its stores. One way this is made possible is through what is known as playbooks. In an interview conducted in mid-September 2010, an Apopka, FL store manager explained how playbooks are used as a globalization strategy:

“We have a playbook for every event such as Halloween. Every store has its own layout and when you click on this playbook, it shows pictures and illustrations of things coming and what the expectation is when you get it to the store. They have it all planned out on the playbook, so the managers basically execute the playbook.”

This excerpt strongly highlights the practice of globalizing (“they [Corporate] have it all planned out on the playbook, so the managers basically execute the playbook”). This validates Warf and Chapman’s (2006) view that store layouts are uniform but require careful planning of product displays and standard sets of merchandise. Having a standard layout is most efficient when it is time for the associates to set it up. They do not have to figure out where certain items or displays would be best located. The home office has already done the research and testing to determine the optimal placement of products. Not only does this standardization have benefits for the store, but it also has benefits for customers. As an East Orlando store manager explained,

“No matter what store a customer enters, whether it be in Florida or Oregon, the basic layout is utilized. This makes it easier for the customers to navigate the stores. If stores

were constantly moving things around or didn't follow the same basic layout among them, they would take away from the shopping experience. It can be very frustrating for a customer to not be able to locate an item quickly, causing them to hunt down an employee for assistance and can even cost the sale. After all, customers don't want to be surprised when shopping. Most people are already in a hurry."

This emphasis on globalization is reflected in statements such as "customers don't want to be surprised when shopping" and "If stores were constantly moving things around or didn't follow the same basic layout among them, they would take away from the shopping experience." These statements imply that there is a necessity for "consistent decision-making practices" (Svensson, 2001, p. 12). These accounts also substantiate what Schumer (2005) explained earlier about the need for uniformity that can be found in chain stores such as Wal-Mart. Convenience is an important factor for customers and this can diminish when there are no elements of standardization across stores.

Globalization can significantly save costs and speed up the growth of a corporation. One participant, a West Orlando store manager, commented about how this can be beneficial to the corporation:

"It's a lot easier for corporate to continue to produce existing models. It's easier to insert a model of operation. In any business, it's easier to stick with what you know. If you stay within Iowa, you don't have to change much, but it's more difficult to take it [model] to El Paso. Not to say there isn't considerable things they have to do differently, but from a business standpoint, it's easier."

This quote stresses the benefit of globalizing within a corporation ("In any business, it's easier to stick with what you know"). The advantage of using a standard model of business and even

design can aid in rapid growth. This is in line with the reasoning provided by Sam Walton (1992) justifying why he originally decided to create stores in a “cookie-cutter” style. In the past, creating stores in a “cookie-cutter” style was a smart approach. However, the United States is becoming increasingly more diversified each day and the demands are varying tremendously among the many different groups of people. Yet, if a standard model can be utilized, to some extent, it can also increase profits.

Though Wal-Mart has strayed away from the practices of just building identical stores in communities across the United States, its stores still have a standard set of products that can be found on shelves in most cities. As another store manager in Oviedo commented:

“We carry the basic essentials that are what people want these days. People know, when they come here, we are going to have what they need for their families. We keep the shelves full, our staff is very efficient at that and, of course, items are at a reduced price.”

This quote exemplifies globalizing in the sense that Wal-Mart carries a standard set of products (“We carry the basic essentials that are what people want these days”). Customers have come to depend on Wal-Mart to be there with the products they need most. Wal-Mart knows this and is sure to keep those commonly needed items such as bathroom tissue, toothpaste, shampoo, beauty products, over the counter medications, just to name a few, as part of the standard merchandise mix. This confirms what Feigner (2006) claims about the products changing minimally and the standard set of merchandise being included in most stores.

In the last interview, a Wal-Mart district manager in Orlando articulated the significance of globalization and the steps market managers take to assess the value of Wal-Mart’s standardization prior to the opening of a store. The participant explained that,

“The store manager and the market manager (we are called market managers) canvas the neighborhood. We look at the demographics and we look at the competition. We study the competition very closely and we try to figure out what they are doing well, what’s working. If we see that another competitor is doing very well in a category, we will try that – you can never tell. So, we have a very complete list of things that we do before the store is even built and then the home office puts it together on a blue print and a map and then we set it from there.”

This quote mirrors the idea that globalization is achieved by looking at it from two key angles: (1) globalization as driven by competition and (2) globalization as approved by the home office. In the first instance, this excerpt points to the fact that influencing local demographics is motivated by the success of competitive retail stores (“We study the competition very closely and we try to figure out what they are doing well, what’s working”). This is new data that was not anticipated when conducting this study. In the second instance, Wal-Mart’s globalization model is reflected through standardization processes (“the home office puts it together on a blue print and a map and then we set it from there”). This is a throwback to Ritzer’s (2008) and Kuhn’s (2009) model of universal business strategies that multinational corporations tend to follow. In the quote, the “home office” refers to the Wal-Mart general headquarters in Bentonville, Arkansas.

### Theme 3: Centralization as a Pattern of Globalization

Just like Theme 2, Theme 3 deals with globalization, but it is seen from a different perspective: that of centralization – implying a strong, institutionalized command from the

corporation's headquarters (Kuhn, 2009). Wal-Mart has centralized key practices of the corporation, reducing some of the responsibilities of the stores' management and ensuring consistency between stores. This manner of controlling the organization is accomplished by a single authority on a number of issues. According to Smith (1990), "the managerial process is becoming more centralized: Managers are further removed from decision-making centers, autonomy is declining, and middle-managerial work is being degraded" (p. 14). Most participants could see the benefits of centralizing control but felt there were some drawbacks as well. After all, managers on the district and store level want to be able to have some input into the workings of their store. According to a Tampa store manager,

"In many regards, standardization is good for the corporation and the customer in terms of layout, signage, ordering, and products. However, some forms of standardization on the part of the home office seem a bit controlling, such as the fact that the temperature of all the stores is controlled by the home office in Arkansas. Yet, one must keep in mind that this can help the corporation as a whole to be more cost-efficient."

This excerpt stresses how globalizing has somewhat become centralized on the part of the home office ("the temperature of all the stores is controlled by the home office"). The participant suggests that it is important to make management feel a part of the decision-making process and not feel as though their input is not valued. Once a manager feels that matters fall beyond their control, dedication levels tend to deteriorate (Svensson, 2001). This could cause the manager to question his or her identity as an authoritative figure and this could be hazardous if picked up on by associates that look to him or her for guidance (Sveningsson & Alvesson, 2003).

Another component of store operations that is controlled by the home office is scheduling. According to another participant,

“Headquarters will tell you how many people work and when. For example, if a football game lasts from 2-5 p.m., the home office will schedule two clerks after game time and 6 before and during the game. The home office standardizes store operations and, basically, it is the store’s job to just deal with what comes through the doors and sell it.”

This vehement accent placed on scheduling typifies centralizing (“the home office standardizes store operations”). Now that the home office has more technological availabilities, it has worked out a system for store design to be more centralized. This system refers back to the modulars and *traiting* designs tailored to each location to optimize sales. This may well be an example of the globalization of glocalization: in this particular example, Wal-Mart is standardizing the way designs are catered to the locals, and managers may have no say in it. In a similar fashion, another participant added that,

“We are an Arkansas-based company which goes through a winter. So, when we first moved to Florida as a company, we were getting snow shovels, sleds, ice scrappers, and it took us probably about five years to figure that out. We didn’t need those in Florida. Now, the *traiting* is so specific that the Miami area traits are completely different than in my area.”

Since the home office can create the merchandising for each store through the creation of modulars that evaluate the demographics of the area and build the modulars and playbooks (Ghemawat, Mark, & Bradley, 2004), less time is wasted accordingly. If managers of each store had to take on this responsibility, they would not have the time to oversee the daily operations of the store. Store managers do enjoy some flexibility to make suggestions and adapt the modulars as they see fit, but they do not create them from the bottom up. According to an Apopka, FL

store manager: “At my store, the home office plays a big part in each store’s operations. The managers make suggestions and report to the home office, which makes the final decisions.”

Wal-Mart is constantly aware of what customers purchase in all their stores that same day – rather than having to wait several weeks for a report to come in. As the same participant said, “The home office can track sales on products sold at any given time. Down to how many items were sold at one store, if it was regular price or a sale price item, and the time of day the purchase was made. This helps the corporation to know what items are selling best in certain areas during different parts of the year or even times of the day. When an item is scanned at the register, the information about the product is recorded and an order is immediately created so that the item can be replaced on the shelf as early as the next day.”

This quote goes hand-in-hand with the observation made by Marquard and Birchard (2007) that Wal-Mart’ information warehouse allows the corporation to follow consumer buying patterns. The tracking done by using the technology at the home office helps each store to be able to keep the items that members of the community need and want consistently on hand. This is akin to Charlie Chaplin’s *Modern Times*, in which all the cogs of the machinery are observed and standardized from the beginning to the end – another portrait of centralized globalization.

Wal-Mart store managers do not participate in researching the areas that the corporation plans to enter. District managers and the home office are in charge of collecting information about these areas (Keen, 2010), which is just another example of how the operations are centralized. This is not to discredit the home office’s examination of communities prior to store opening because a tremendous amount of time and research was put into each project. According to an Orlando manager, who said that he does not partake in the process:



“For the most part, the decision making is all done above me. Kind of what they [Wal-Mart headquarters] do is, I don’t know exactly how it works, but we have this computer system that graphs how many customers there are around a location because you have to have so many customers.”

The participant’s statement that “the decision making is all done above me” exemplifies what Saporito (2003) wrote about Wal-Mart’s centralization process. To put it briefly, for Saporito, Wal-Mart’s centralization of control and authority at its headquarters in Bentonville could produce agitation among its managers, who have expressed desires to be granted more independence in providing what locals want.

#### Theme 4: Organizational Socialization

Theme 4 emerged from the participants’ responses when they hinted at concepts such as group communication (e.g., in meetings), social networking, and information acquisition. This is all about organizational socialization – how employees and/or managers gather as a group to communicate, learn rules, and receive information (Jones, 1986). Organizational socialization also refers to the way employees learn to adapt to a corporation’s culture (Allen & Meyer, 1990). According to Bullis (1993), “socialization is treated as a developmental, longitudinal communicative process” (p. 10). Theme 4 is interesting because it describes the types of communication channels that Wal-Mart uses to communicate with managers.

The corporation employs a variety of means to communicate with its managers, which is beneficial to the socialization process. For Fieldman (1976), “the socialization process is developmental it is hypothesized that newcomers will shift their information acquisition

strategies over time” (p. 445). Therefore, utilizing a variety of communication methods can help managers and employees alike experience a smooth organizational socialization process in which they learn about the organizational culture and its principles from the start. This substantiates what Vedder and Cox (2006) pointed out earlier about the importance and strength of a corporation to promote its organizational culture.

To begin, one Wal-Mart manager in Orlando explained the purpose of the meetings that he is in charge of conducting. Wal-Mart has come up with creative ways to pass information to its employees and ensure that they know what is expected from them day in and day out:

“The home office communicates messages about strategies they wish to pursue as well as encourage employees to work harder through meetings held each morning. This is where the associates participate in the Wal-Mart cheer to get their day off to a good start and really lightens the mood. I know it puts a smile on my face.”

This excerpt displays a type of organizational socialization that has been well received by employees (“the associates participate in the Wal-Mart cheer to get their day off to a good start and really lightens the mood. I know it puts a smile on my face”). This substantiates Schneider’s (1998) view of incorporating the Wal-Mart cheer into the daily meetings as a great way to motivate employees about the day ahead and arm them with strategies for success. The cheer also helps employees to get a true sense of what the Wal-Mart culture really is like and makes them want to be a part of it even more. This type of organizational socialization begins with downward communication (“The home office communicates messages” to subordinates) and progresses to horizontal [peer-to-peer] communication (“the associates participate in the Wal-Mart cheer”).

As organizational communication scholar Linda Putnam (1982) put it, this shift from downward communication to horizontal communication has proved effective “when the well-oiled machine” (p. 195) does not break down and when organizational coordination (i.e., through efficient information flows) works well. A similar communication strategy encouraged to all levels of employees is talking face-to-face with management. Traditionally, communication is sent down the chain of command to the lower levels of each store – but not here. Another store manager in the Orlando area explained this process:

“The home office communicates information to district managers who then can communicate with their store managers by teleconference. They also make visits to the stores every couple months so they can keep up with what is going on at all their stores and provide the stores with important information.”

This quote highlights several means of organizational socialization. We have, again, the downward communication process (“The home office communicates information to district managers who then can communicate with their store managers”). Downward communication has been examined methodically by Frazier and Summers (1984) with respect to information transmission between superiors and subordinates in U.S. workplaces. The other means of organizational socialization is “teleconference” and managers providing “the stores with important information.” One Central Florida store manager alluded to a crucial element of organizational socialization: upward communication – the way information flows from lower levels of a hierarchy to upper levels (Athanasziades, 1973):

“Wal-Mart managers practice the open-door policy, which allows associates to communicate about issues that arise directly with management and, of course, management will then pass these messages or feedback to the home office if necessary.

This policy allows employees to feel comfortable about communicating with their superiors.”

Indeed, elements of organizational socialization here deal with the reverse of downward communication: upward communication – as seen in statements such as “management will then pass these messages or feedback to the home office if necessary” and “This policy allows employees to feel comfortable about communicating with their superiors.” Wal-Mart’s open-door policy has been discussed by Ihator (2004) and Walton (2005), who view this type of socialization as effective when it is a genuine two-way communication channel, in which both sides are heard. From the participant’s words, Wal-Mart’s open-door policy seems to be efficient: “This policy allows employees to feel comfortable.” The way Wal-Mart’s open-door policy enables employees to communicate with managers (or people at upper levels) more easily and get more information about issues is in line with what Bradley and Ghemawat (1996) noted about this policy: managers are guaranteed that their voice will be heard and assessed fairly.

Another aspect of organizational socialization brought up in some interviews is social networking. In a time when social networking sites are a popular way to connect with people, it is no surprise that Wal-Mart has been quick to make it one of its means of communication with its employees and managers. According to a store manager in the northern side of Orlando,

“The home office communicates through the Wal-Mart website with a type of social networking so that store employees communicate with the home office and can also communicate with other Wal-Mart associates. The site also has videos that associates can watch to get more information from the home office.”

This excerpt draws attention to the fact that Wal-Mart is one of the companies that have seen the benefits of social networking and have decided to take it a step further making it a part of their

organizational socialization. It is common to see companies using social networking to market their business, reach potential customers, and obtain feedback from current customers. These social networking practices have been so effective that companies such as Wal-Mart are now using them internally to communicate with employees.

Another example of social networking, as a communication strategy, is email. Not only does email allow employees to send messages to others in the corporation (that can be received in a matter of seconds); it also gives employees the ability to transfer files and pictures almost instantly from one computer to the next across the country. This is a great alternative to standard mail, which can take days to arrive at its destination and can be costly on a large scale (Cheney et al., 2010). A store manager from the southern part of Orlando comments about which communication strategy she prefers to use:

“I think for how big Wal-Mart is right now; email is probably the best way. You can’t always visit the store and you can’t always talk to that one store manager, so I think email is probably the most critical means of communication from manager to manager, manager to store buyer. You leave messages and don’t see each other for a couple of days, but email is there and all of us can read it. It’s the best way.”

This excerpt emphasizes the benefit of email to organizational socialization (“I think email is probably the most critical means of communication”). Email is ideal for both horizontal communication (“from manager to manager”) and downward communication (“manager to store buyer”). As the participant pointed out, without email, Wal-Mart would not be nearly as effective because this electronic mail has transformed the way a corporation manages employees.

Wal-Mart is an innovator when it comes to utilizing new communication technologies. One of the newest means of communication is the internal site or intranet, which one of the

Orlando store managers demonstrated for the researcher. Cozijn, Maes, Schackman, and Ummelen (2007) define the intranet as “an internal website containing news, instructions, communication facilities, and other organizational information for employees. Intranets are often intended to replace paper piles of memos and to reduce costs on meetings and training personnel” (p. 203). As the Orlando store manager, who demonstrated this system, stated:

“The internal system is pretty much a store’s everyday life and what it does is it keeps management informed on what’s coming up. One feature is a 90-day look ahead, which allows a preview of what to expect in the next three months so management can plan ahead.”

This is upward communication *per se* (“it keeps management informed on what’s coming up”). Intranets are meant to keep a longitudinal flow of data and information and, at the same time, reduce inefficiencies and miscommunications as were witnessed by managers before the intranet was born. In a sense, the intranet is the human side of supply chain management and information systems (Lancioni, Smith, & Oliva, 2000). Additionally, the participant showed the researcher how to explore the fall outdoor-living modular to set up the Wal-Mart garden center. More precisely, the participant showed the business plan changes from summer to fall. He then explained what managers had to catch up on. One item listed was the labor relations training that all supervisors had to have completed by the seventh of that month. As the participant added:

“When this is accomplished, I [the manager] will click it to check it off that it was done and it disappears from the to-do list. However, if it is not done by the set deadline, an overdue list will come up letting the manager know he or she is behind and needs to get back on track immediately. This allows the home office to keep track of what the stores are doing and what their progress is all the time. Basically, the system is the task manager

so the corporation can send the tasks down and then the store managers delegate them out making sure they are completed. This system is easy to use and no longer gives managers the excuse not to get their work taken care of, holding them accountable.”

This excerpt demonstrates the use of upward communication (“This allows the home office to keep track of what the stores are doing”) and downward communication (“the corporation can send the tasks down and then the store managers delegate them out making sure they are completed”) through technological use. So far, in this analysis, both upward and downward communication have been mostly looked at from a human, face-to-face standpoint. Here, however, both upward communication and downward communication have a digital, high-tech interface – which seems to work for organizational socialization. Flanagin and Waldeck (2004) studied the role of technology in organizational socialization. By and large, what they found is that correct, adequate, and sufficient information is essential to employees’ efforts (particularly newcomers) to become successfully socialized. Furthermore, the use of advanced technologies can help obtain and exchange superior information. As our participant continued to note:

“This is a great way to communicate. We use to do it all on priority notes, that’s a list from the executives of what they wanted done for the week. It was a print-out, and you carried it around and got the things done. In the past, some people weren’t getting it done and nobody was following up on it. Now, anyone in a minimum wage office can follow up and say, ‘Hey these stores aren’t doing their job, let’s go see what’s going on.’ I don’t see how else you could communicate so effectively.”

This excerpt exemplifies the fact that technologically-based internal communication is part of what executives, managers, and associates depend on to keep informed and maintain organizational socialization (“I don’t see how else you could communicate so effectively”).

Within a corporation with nearly 1.4 million associates in the United States alone ([www.walmartstores.com](http://www.walmartstores.com)), the importance of effective ways for organizational socialization processes (and, simply, to relay information) is essential.



## CHAPTER FIVE: CONCLUSION

This study has gathered fresh data and shed new light on the complex paradigm of Wal-Martization of U.S. communities. In this conclusion, the researcher describes, in detail,

- (a) the summary of the findings (and, above all, addressing Research Question 1 and Research Question 2 of this thesis project),
- (b) closing remarks on dialectical tensions between glocalization and grobalization (and, in the process, addressing Research Question 3),
- (c) the limitations of this study, and
- (d) suggestions for future research.

### Summary of Findings

Research Question 1 (RQ<sub>1</sub>), “What does Wal-Mart communicate with its managers about the globalization of various U.S. communities?,” was addressed through the participants’ responses and the researcher’s analysis of them – as interpreted in the first three themes especially. RQ<sub>1</sub> was dealt with, in part, through the lens of glocalization. Indeed, managers said they have a responsibility to cater to the community, to adapt to the Hispanic populations, and to learn from the mistakes abroad – e.g., when Wal-Mart failed to tell its managers to adjust to the preferences of the locals (one participant’s example about Wal-Mart’s undertaking in Central America). From this vantage point, the globalization of various U.S. communities does not automatically mean that the corporation follows a strategy of a one-size-fits-all model of retail. At the same time, RQ<sub>1</sub> was also tackled through the paradigm of grobalization. Without a doubt,

Wal-Mart instructs its managers to follow the Bentonville-based blueprint of standard operating procedures, particularly with respect to a number of firm decision-making practices – even when venturing into remote, local communities in the nation. From the participants’ responses, Wal-Mart’s insistence on having a uniform model of retail can help the company achieve rapid growth and greatly decrease costs. Globalization is also reflected in the third theme on centralization – particularly with Wal-Mart’s strong emphasis on scheduling and the lack of opportunities that managers have on certain key issues.

Research Question 2 (RQ<sub>2</sub>), “How does Wal-Mart instruct its managers to develop strategies aimed at globalization and/or glocalization?,” was addressed through the participants’ responses and the researcher’s analysis of them – as interpreted in the fourth theme particularly. In general, from the interviews, it emerged that Wal-Mart communicates with its managers through strategies, situations, and circumstances that organizational communication scholars identify as “organizational socialization” (Ostroff & Kozlowski, 1992; Van Maanen & Schein, 1979). For example, as we have seen, Wal-Mart provides explicit guidelines about the sequence and timing of progression of the company (e.g., the idea that executives “provide the stores with important information” on Wal-Mart’s future). In addition, Wal-Mart managers who are socialized collectively go through a communal set of experiences (e.g., regular meetings, the Wal-Mart cheer that gets “their day off to a good start,” etc.). Now, we can further summarize the findings based on each of the four themes.

With respect to the first theme, “Awareness of Glocalization as Key to Success,” it emerged from the participants’ responses that glocalization means to play by the customers’ rules. Whether the participant was a store manager or a district manager, he or she would occasionally say that the success of Wal-Mart could be attributed to the fact that its stores have a

responsibility to cater to the community. For the participants, “catering” includes having both the English and Spanish languages on all of the store signs, connecting with customers, and pleasing Hispanic neighborhoods (“The Hispanic customer is a little smaller in stature so the smaller size shoes and the smaller clothing sell better than a normal store”). The excerpts on Hispanic populations shopping at Wal-Mart can provide synonyms of glocalization such as “diversification,” “creolization,” “crossover,” or “mestizaje” (Kuhn, 2009). Wal-Mart’s strategy of *traiting* is also efficient; it allocates more shelf space to a particular product or range of products based on the customer’s preferences. On the whole, the first theme is a contestation of the globalizing strategy of a one-size-fits-all model of retail. As one participant emphasized, “this store has connected very well with the community.” Glocalization can even mean “kowtowing” to locals, instead of obediently “obediently kowtowing to centralized control” (Creeber, 1994, p. 34). One participant pointed out that, currently, glocalization is possible thanks to Wal-Mart’s ventures abroad (e.g., in Central America), where it learned the precious message that one has to adapt or one will fail.

In regards to the second theme, “Globalization Strategies Implemented,” crucial statements made by the participants suggest a necessity for strong standard operating procedures and steady decision-making practices – as reflected in quotes such as “adjust to that standard” and “If stores were constantly moving things around or didn’t follow the same basic layout among them, they would take away from the shopping experience.” Based on the participants’ stories, the benefit of having a uniform model of retail can help Wal-Mart achieve rapid growth and considerably save costs – and achieve its status of cathedral of consumption. As one Orlando manager added, standardization corresponds to the reasoning provided by Sam Walton (1992) that Wal-Mart has to be created in a “cookie-cutter” style. Some interviews also pointed toward

Wal-Mart's long-term aim to reduce diversity and differences among its supercenters, attempting to homogenize operations, which is in line with Ritzer's (2008) concept of globalization. As a result, as some participants contended, it is no surprise that Wal-Mart products change minimally and the standard set of merchandise are included in most of its stores.

*Vis-à-vis* the third theme, "Centralization as a Pattern of Globalization," it appears from the interviews that Wal-Mart's centralization is echoed by the decision-making process stemming from the home office and the general centralized selection for store designs. As Kuhn (2009) remarks, centralization insinuates powerful, institutionalized control from the corporation's headquarters – even when it comes to regulating the temperature of all the Wal-Mart stores, as one manager admitted. Centralization is even seen through a strong emphasis on scheduling ("the home office standardizes store operations"). As other participants said, Wal-Mart store managers lack input in key areas of Wal-Mart's growth, such as researching the areas – and collecting information about these areas – that the corporation plans to enter. Because Wal-Mart's information warehouse has the objective of following consumer buying patterns, the corporation's focus on centralization resembles Charlie Chaplin's *Modern Times*, in which all the cogs of the machinery are operated by the headquarters from the beginning to the end.

Concerning the fourth theme, "Organizational Socialization," managers socialize through processes of group communication (e.g., in meetings), social networking, and information acquisition. The literature on organizational socialization has shown that its prominence in the workplace shapes managers' subsequent attitudes and behaviors (Buchanan, 1974; Hall, 1976; Wanous, 1980). As participants shared during the interviews, managers become socialized to the Wal-Mart culture by participating "in the Wal-Mart cheer to get their day off to a good start." Organizational socialization was also referred to a lot when participants mentioned the

importance of information transmission between superiors and subordinates. This happens through three main channels of communication: (1) Downward communication (“The home office communicates messages” to subordinates), (2) horizontal [peer-to-peer] communication (“the associates participate in the Wal-Mart cheer”), and (3) upward communication – as seen in statements such as “management will then pass these messages or feedback to the home office if necessary.” Regarding the latter, upward communication, Wal-Mart’s open-door policy allows managers to communicate with people at upper levels more easily and obtain better information about issues. Finally, organizational socialization at Wal-Mart occurs through technology: Teleconference, social networking, intranet, and email – which the participants said was ideal for both horizontal communication and downward communication.

#### Dialectical Tensions between Glocalization and Globalization

Wal-Martization is a process that requires more work and effort than most realize. Meeting the needs of local Wal-Mart stores varies from one geographical location to the next. Therefore, achieving this aim can turn out to be difficult. This study has looked at globalization from a new perspective. While, by definition, globalization is a reversal of the meaning of glocalization, this study has revealed that part of Wal-Mart’s phenomenal success is to be both globalizing and glocalizing. Wal-Mart offers its customers the opportunity of consuming locally (e.g., Hispanic products, Mediterranean food), globally (e.g., universal U.S. merchandise), or both simultaneously (like products and traditions found in Orlando stores).

Research Question 3 (RQ<sub>3</sub>), “What are the patterns toward dialectical tension that emerged across the participants’ accounts?,” was addressed through the analysis of the

dialectical tensions between glocalization and globalizaton. Based on certain Wal-Mart strategies, both neologisms lead to the perception that they can be extreme – it is one way or the other. Based on other Wal-Mart strategies, both glocalization and globalizaton lead to believe that they can be found “in-between” – that is, in the “intermediate” or the “betwixt.” This study demonstrates that the dialectical tensions between glocalization and globalizaton follow a model of globalism that assumes, simultaneously, openness to cultural difference and demarcation. This is consistent with Kuhn’s (2009) assertion that cultures are not closed towards change; they borrow from other cultures and reinterpret local cultural practices. At the same time, they carefully follow their own agenda (i.e., cultural schema) to reach their initial objectives. In this sense, both glocalization and globalizaton work well for the successful Wal-Martization of U.S. communities.

To further answer RQ<sub>3</sub>, three dialectical tensions between glocalization and globalizaton were identified: (1) Autonomy vs. Control, (2) Kowtowing vs. Imposing, and (3) Diversity vs. Non-Diversity. These dialectical tensions are supplied with examples from both this study and the globalization literature.

#### Autonomy vs. Control

This is precisely the dialectical tension that Wal-Mart managers face: the autonomy that the company grants them versus the control that it enforces on them. Participants seem to favor glocalization more than globalizaton. However, they also see some necessity for Wal-Mart to apply globalizing strategies. For example, they could see the advantages of centralizing control but felt there were some downsides as well. The idea of autonomy through glocalization (“We

have that autonomy to pull things in and put things out based on what we think is right”) corroborates what Rugman and Girod (2003) said about Wal-Mart managers – that they have some freedom as to how they “run” their store. In some circumstances, they have more flexibility in choosing which products are to be displayed and in setting prices that match local market conditions. Likewise, trends of organizational socialization such as “cheering” sessions, open-door policies, and other opportunities for upward communication exemplify more autonomy. On the other hand, participants acknowledged that Wal-Mart strives to maintain a level of uniformity and standardization across its stores (“they [Corporate] have it all planned out on the playbook, so the managers basically execute the playbook”). This is also a throwback to Warf and Chapman’s (2006) idea that store layouts entail careful planning of product displays and standard sets of merchandise. Wal-Mart managers tend to benefit from some flexibility to make suggestions and adjust the modulars as they see fit, but they do not create them from the bottom up.

### Kowtowing vs. Imposing

This is another dialectical tension that Wal-Mart managers face: kowtowing to local communities versus imposing Wal-Mart products and practices on them. Kowtowing is glocalization; imposing is globalization. In a literal sense, kowtowing means bowing to someone to show respect. Metaphorically, in this study, it means enacting the practice of catering to local cultures. As participants recognized it, the local community will have an influence on the decision-making procedures and strategies of a corporation, even for a giant multinational corporation (MNC) like Wal-Mart (e.g., whether “you’re in New York or in Miami”). As the

researcher remarked, there is a necessity of pleasing customers to such a degree that nobody would be “left out” – like a duck caring for all its ducklings. However, Wal-Mart’s strategy of “imposing” its products and practices can also be efficient. Wal-Mart executives reason that a standard model can be utilized, to some extent, to increase profits. Its stores have a standard arrangement of products found on shelves in most U.S. cities (“We carry the basic essentials that are what people want these days”). To earn optimal sales and profits, Wal-Mart is imposing modulars and *traiting* designs tailored to each location. Although Wal-Mart managers find those designs useful in “reaching out” to more customers, they still concede that they have no choice in the matter.

#### Diversity vs. Non-Diversity

Diversity is a product of diversification – glocalization. Non-diversity is a corollary of heterogenization – globalization. From the participants’ responses, multiple examples were given about Wal-Mart stores catering to Hispanic neighborhoods. Statements about diversity such as, “I have about five nationalities working here. I do require everyone to speak English” and “You’re going to get 60 extra feet in this store for Hispanic merchandise,” reflect the very neologism of Robertson’s (1994) glocalization: increasing diversity and reducing differences with local communities will influence the way customers will perceive their store. It is almost as though their culture is put on a higher pedestal. On the other hand, reducing diversity and differences among stores, standardizing operations (i.e., “adjust to that standard”), and striving for uniformity are practices that reflect Ritzer’s (2008) globalization. The following quote



captures the essence of Wal-Mart's effort toward non-diversity: "There was too much diversity and nobody was on the same page." In this sense, "too much diversity" is an obstacle.

### Limitations

Three limitations were found when this study was conducted. The first limitation deals with difficulties finding a sufficient number of Wal-Mart managers to interview. While the researcher managed to get ten successful interviews, she could have gotten more. The reality is that, while some participants were initially disposed to being interviewed, they backed off after hearing certain questions on globalization – on the grounds that Wal-Mart is not the type of organization that should contribute to an academic research project. For example, one manager said she was afraid of revealing too much information not intended to be open to the public.

The second limitation pertains to time constraints. In many cases, with just a couple of months available, scheduling ten lengthy interviews all over Central Florida was not a cakewalk. In a similar vein, in order to take part in the study, the participants had to meet specific parameters – i.e., to be a Wal-Mart manager, to have a sufficient amount of knowledge about Wal-Martization and globalization, and so forth. In spite of these constraints, it was essential to the thesis and research questions that this specific collection of managers be interviewed.

The third limitation concerns the method used in this study: in-depth, face-to-face qualitative interviewing. Some of the ten interviews might not have provided adequate amounts of data on concepts such as glocalization, globalizaton, adaptation, standardization, and venturing in local cultures. It is possible that a few participants may have modified their accounts for unknown reasons. By the same token, when conducting in-depth, face-to-face qualitative

interviewing (even after audio-taping full conversations), there is a continuous probability that the researcher can distort interview interpretations.

### Future Directions

For future research, both organizational communication and globalization scholars should look into four untapped areas. To begin, the complexity of contemporary organizational socialization in U.S. corporations cannot be captured by one standpoint or paradigm alone. While the fourth theme of this study pertains exclusively to organizational socialization, it would prove useful to further analyze it within the framework of similar studies on dialectical tensions between glocalization and globalizaton. As such, are there any dialectical tensions between the two neologisms in terms of organizational socialization? In addition, to what extent does either glocalization or globalizaton affect organizational socialization? Are the differences attributed to a polarized phenomenon – i.e., would it be so different for glocalization than it would be for globalizaton)? Or are differences to be found alongside a continuum between the two?

Second, on the same topic of organizational socialization, it is evident from the participants' responses that Wal-Mart's open-door policy is efficient: "This policy allows employees to feel comfortable." Therefore, the following questions can be addressed: To what extent is Wal-Mart's open-door policy efficient and what subject matters and/or topics are openly discussed and not off-limits? The answers provided in future studies would reveal more about the direction, seriousness, or importance of upward communication within the Wal-Mart corporation.

Third, concerning the differences that exist between glocalization and globalizaton, additional comparative analyses need to be done. Are glocalization and globalizaton two continua? Are there actually more intersections than divergences? If so, how can they be quantified or operationalized? As we have seen, the ultimate conclusion of this study is that both glocalization and globalizaton are needed for the successful Wal-Martization of U.S. communities. Yet, would one of the two not have a tendency to be more efficient for a multinational corporation (MNC) like Wal-Mart? If so, can one overwhelm the other? In line with these questions and contentions, would Wal-Mart's glocalizing strategies work better for certain types of products and/or practices than others? Can the same thing be said about Wal-Mart's globalizing strategies?

Lastly, with respect to the impact of both glocalization and globalizaton, it would be interesting to investigate the perspectives of local customers. This study has demonstrated that participants seem to favor glocalization more than globalizaton – at the same time, they see some necessity for Wal-Mart to apply globalizing strategies. Local customers are also individuals with a great impact on globalizaton overall. They represent resourceful and influential agents of change – their influence would be akin to a “make or break” situation for a corporation, even a giant MNC (Wild, Wild, & Han, 2009). Globalizaton processes are relational and contingent (e.g., think of the participants' stories on Hispanic populations in certain parts of Orlando). That suggests Wal-Martization is affected by a great deal of reactions on the part of local communities. Investigating the perceptions of local customers is a must.

It is the researcher's hope that this extensive study on Wal-Mart's glocalization and globalizaton practices has enlightened laypersons and scholars alike. Wal-Mart is an organization that will not go away any time soon – maybe one day we will live on Planet Wal-

Mart. For the time being, let us confine ourselves to the limited knowledge we have on its current globalization tactics.

## **APPENDIX A: INTERVIEW PROTOCOL**

- 1) How does your Wal-Mart store cater to the local culture or community? What have you done since this particular store has opened?
- 2) Why do you think Wal-Mart is so effective in this local culture or community? What are you doing that works so well?
- 3) To what extent do managers examine each local U.S. culture or community before opening a Wal-Mart store there?
- 4) How do you balance the needs of the local culture or community with the fact that you are a multinational corporation (MNC)?
- 5) What are your own perceptions, as a manager or executive, of Wal-Mart's adaptation practices? To what extent do you like it?
- 6) What specific adaptation strategies are you using at this Wal-Mart store, with respect to branding, merchandise mix, services, etc.?
- 7) In what domains does standardization or uniformity across cultures work for Wal-Mart?
- 8) What are your own perceptions, as a manager or executive, of Wal-Mart's standardization or uniformity practices? To what extent do you like it?
- 9) Do you feel that Wal-Mart's standardization practices, in general, harm local cultures or communities?
- 10) In your opinion, of the two globalization models, which one do you tend to favor the most: adaptation or standardization? Why?
- 11) How do the Wal-Mart top brass communicate messages or inform you about the company's strategies for either adapting to a specific community or standardizing to the latter?
- 12) In your opinion, are the communicative strategies adopted by Wal-Mart executives ideal? What would more effective communicative strategies be?

13) Do you have anything else to add?

**APPENDIX B: INFORMED CONSENT FORM**



**PROJECT TITLE:** Dialectical Tensions between Globalization and Glocalization for Wal-Mart in the United States  
**PRINCIPAL INVESTIGATOR:** Laura Lord  
**CONTACT INFORMATION:** (407) 257-4781, [lrl23pb@yahoo.com](mailto:lrl23pb@yahoo.com)

My name is Laura Lord and I am a Master's Student in the Nicholson School of Communication at the University of Central Florida. You are being asked to volunteer for a research study. Please read this form and ask any questions that you may have before agreeing to take part in this study.

### **The sponsor of the study**

The sponsor of the study is the Nicholson School of Communication at the University of Central Florida. I, Laura Lord, am the principal investigator.

### **Purpose of the Research Study**

The purpose of this study is to examine Wal-Mart's managers' perspectives of strategies that the corporation has implemented in order to Wal-Martize the United States. Two key strategies that have been identified in the literature are *glocalization* and *grobalization* – two different forms of globalization. *Glocalization* (a portmanteau of “local” and “globalization”) refers to the strategies that a major corporation uses to cater to local cultures or communities. In other words, it means adapting to local tastes and differences. Conversely, *grobalization* (a portmanteau of “growth” and “globalization”) refers to the uniform or standardized strategies that a major corporation applies across all cultures or communities, without paying attention to local sensitivities.

### **Procedures**

If you agree to be in this study, you will be asked to do the following things. I will use the method of qualitative interviewing. I will ask you to answer general questions about Wal-Mart's strategies in globalization. The interview will last 45-60 minutes. An audio-tape recorder will be used to record the interview because I need to transcribe the information that you will give me. Your name will NOT be mentioned. Your store location and number will NOT be mentioned either. Your participation is confidential. You can use a nickname or pseudonym.

### **Risks and Benefits of Being in the Study**

The study has no risks involved. If you feel uncomfortable answering my questions, feel free not to answer them. There are no benefits involved regarding your participation in my study.

### **Compensation**

Participation in this study is free and no monetary or any type of compensation is given to the participants.

### **Voluntary Nature of the Study**

Participation in this study is voluntary. Your decision whether or not to participate will not result in penalty or loss of benefits to which you are otherwise entitled. If you decide to participate, you are free to not answer any question or withdraw at any time. You must be 18 years of age or older to participate.

### **Confidentiality**

The records of this study will be kept private. Participants will use pseudonyms. In published reports, there will be no information included that will make it possible to identify the research participant. Research records will be stored securely. I will store the transcriptions of the data and keep these transcriptions safe by locking them into a program file that can only be opened with a password. I will keep the audio-tapes in a private room that has a safe. I will destroy the audio-tapes as soon as I transcribe all the information recorded on those tapes. Only approved

researchers (i.e., my thesis advisor) will have access to the records. When the tape recordings are made, only my advisor will have access to them. He will use them for educational purposes. Again, these tapes will be erased as soon as I transcribe the information that you will give me.

### **Audio Taping of Study Activities**

To assist with accurate recording of participant responses, interviews may be recorded on an audio recording device/video recording device. Participants have the right to refuse to allow such taping without penalty. Please select one of the following options.

- I consent to the use of audio recording.
- I do not consent to the use of audio recording.

### **Contacts and Questions**

The researcher(s) conducting this study can be contacted at (407) 257-4781 or [lrl23pb@yahoo.com](mailto:lrl23pb@yahoo.com) (for Laura Lord, the principal investigator) and (407) 708-2830 or [jmatusit@mail.ucf.edu](mailto:jmatusit@mail.ucf.edu) (for Dr. Jonathan Matusitz, the faculty sponsor). You are encouraged to contact the researcher(s) if you have any questions.

If you have any questions about your rights as a research participant, you may contact the University of Central Florida – Institutional Review Board at (407) 823-3778.

You will be given a copy of this information to keep for your records. If you are not given a copy of this consent form, please request one.

### **STATEMENT OF CONSENT**

I have read the above information. I have asked questions and have received satisfactory answers. I consent to participate in the study.

Date: \_\_\_\_\_

**APPENDIX C: IRB APPROVAL LETTER**



University of Central Florida Institutional Review Board  
Office of Research & Commercialization  
12201 Research Parkway, Suite 501  
Orlando, Florida 32826-3246  
Telephone: 407-823-2901 or 407-882-2276  
[www.research.ucf.edu/compliance/irb.html](http://www.research.ucf.edu/compliance/irb.html)

## Approval of Exempt Human Research

From: **UCF Institutional Review Board #1**  
**FWA00000351, IRB00001138**

To: **Laura R. Lord**

Date: **September 01, 2010**

Dear Researcher:

On 9/1/2010, the IRB approved the following activity as human participant research that is exempt from regulation:

Type of Review: Initial Review

Project Title: Dialectical Tensions between Globalization and Glocalization for  
Wal-Mart in the United States

Investigator: Laura R Lord

I RB Number: SBE-10-07085

Funding Agency: None

This determination applies only to the activities described in the IRB submission and does not apply should any changes be made. If changes are made and there are questions about whether these changes affect the exempt status of the human research, please contact the IRB. When you have completed your research, please submit a Study Closure request in iRIS so that IRB records will be accurate.

In the conduct of this research, you are responsible to follow the requirements of the Investigator Manual.

On behalf of Joseph Bielitzki, DVM, UCF IRB Chair, this letter is signed by:

Signature applied by Janice Turchin on 09/01/2010 03:32:53 PM EDT

A handwritten signature in cursive script that reads 'Janice Turchin'.

IRB Coordinator

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