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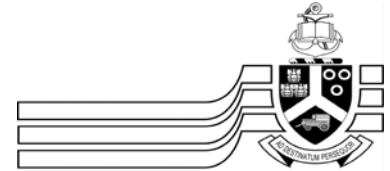
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ANNEXURE 1: QUESTIONNAIRE AND COVER LETTER



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An investigation into the nature of strategy as practiced in South African organisations and as taught at South African universities

Dear respondent,

The following questionnaire is part of an extensive research study undertaken to investigate *how strategy is formed/ created in South African organisations*.

Participation is voluntary and you may withdraw from participation in the study at any time and without negative consequences. By completing this survey,

- I hereby consent to take part in the research study (as mentioned above);
- I understand that the data gathering will be confidential; and
- That the respondents will have access to the data results thereof.

There are no right or wrong answers but it is important to indicate your **personal view** irrespective of what you may believe others will think. It will be highly appreciated if you would complete the questionnaire as thoroughly as possible. All information and responses will be treated as confidential and will not be linked to your organisation or to you as respondent in any way.

Thank you for spending 20 minutes of your valuable time to complete this questionnaire. Without your response this research will not be possible.

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Instructions for completion:

1. Please answer all questions as objectively as possible.
2. Indicate your answer with a cross in the space opposite the alternative you choose or in the space where the alternative is provided.
3. Don't ponder too long on a question - your first thoughts are important.



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
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SECTION A: BUSINESS AND DEMOGRAPHIC DETAILS

1. What is the size of the organisation where you are employed?

Office use only

Very Small (1-20 employees)	1
Small (20-50 employees)	2
Medium (50-100 employees)	3
Large (>100 employees)	4

V1

2. To which business sector does your organisation belong?

Private sector	1
Parastatal	2
Government/ public sector	3
Other (Specify)	4

V2

3. In which industry does your organisation operate? (e.g. *Health, education, telecommunications, banking, etc.*)

V3

4. Please indicate your position/ level in your organisation

Top management	1
Middle management	2
Lower level management	3
Non-managerial	4

V4

5. How old are you? years

V5

6. What is your highest level of education?

Doctor's degree	1
Master degree (not MBA/MBL)	2
MBA/ MBL	3
Honours degree	4
Degree (=> 3 years)	5
National diploma (3 years)	6
Matric (Grade 12)	7
Less than matric	8

V6



7. Have you had any formal training in strategy?

Yes No

V7	
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If yes, what type of training? *More than one option is possible.*

A full subject as part of a degree programme	1
A full subject as part of a post graduate degree programme	2
A sub-unit of a subject as part of a degree programme	3
A sub-unit of a subject as part of a post graduate programme	4
As part of a diploma or certificate programme	5
In-house training at my organisation	6
On the job training	7
Other (specify)	8

V8	
V9	
V10	
V11	
V12	
V13	
V14	
V15	

SECTION B: STRATEGIC ENDS SPECIFICITY

Definitions:

Ends: are the major, higher level **purposes, mission, goals or objectives** set by organisations, each of which (should there be more than one) significantly influences the overall direction and viability of the organisation concerned. Ends relate to **what** an organisation intends to achieve.

Means: are the patterns of action which allocate organisational resources into postures that, once implemented, increase the probability of attaining organisational ends. Means relate to **how** an organisation intends achieving ends. E.g. means include **strategies of policies, alternatives, programmes, action plans or initiatives.** (Brews & Hunt, 1999)

1. Please indicate what *mostly* describes your organisation:

No ends have been developed for our organisation in the strategy formation process	1
A few (less than 5) ends have been developed for our organisation in the strategy formation process, but they remain undocumented and informal	2
A few (less than 5) ends have been developed for our organisation and formally documented in the strategy formation process	3
A number (greater than 5) of ends have been developed for our organisation in the strategy formation process, but they remain undocumented and informal	4
A number (greater than 5) of ends have been developed for our organisation and formally documented in the strategy formation process.	5
Many ends have been developed for our organisation and formally documented in the strategy formation process, including a statement of firm mission/purpose, and specification of strategic objectives/goals for different areas of the organisation.	6

V16	
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2. Please indicate the approximate percentage of ends for your firm that have quantified measures included in their terms, allowing you to tell *fairly exactly* or to *determine with confidence* whether or not they have been achieved:

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1	2	3	4
0 – 25%	25% – 50%	50% - 75%	75% - 100%

V17

3. Please indicate the approximate percentage of firm ends that have time limits included in their terms, stating an *exact time* by which they must be achieved:

1	2	3	4
0 – 25%	25% – 50%	50% - 75%	75% - 100%

V18

4. Indicate *in general* the specificity of your organisation's ends.

For example, very specific ends would be those which identify exact objectives (achieving sales growth of 10% per annum, or achieving a return on investment of 15% per annum) such that little need for interpretation or further explanation exists. A broad, unspecified end could be "to become the best electronics retailer in the world" or "the purpose of this firm is to develop competitive electronics products in its chosen market niche."

Please indicate the *one* statement which best describes your organisation's ends.

1	2	3	4
Very unspecified	Generally unspecified	Generally specific	Very specific

V19

5. Please indicate the types of ends which usually are included in your organisation's strategic plan, or usually emerge from your organisation's strategy formation process. *You may indicate more than one statement.*

A statement of your organisation's mission or fundamental purpose	1
Broad statements of key strategic objectives for the organisation, which tend to change/ evolve as circumstances warrant	2
Broad, enduring statements of key strategic objectives for the organisation over the foreseeable future, which emerge fully developed from the planning process, and tend not to change until achieved	3
Statements of specific financial targets to be achieved either annually, or over the foreseeable future, for example ROI targets, profitability targets, or other targets of financial performance	4
Statements of specific market share/sales growth targets for the organisation	5
Statements of specific key result areas/objectives for many/all functions/operations of the organisation, providing key measurements of vital organisational activities. Achievement of these key results/objectives is considered important, and part of employee compensation is based on such achievement	6

V20

V21

V22

V23

V24

V25



SECTION C: STRATEGIC MEANS SPECIFICITY

1. Please indicate which **one** statement best describes your firm. Note that the last two statements differ only in the underlined sentences.

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V26

No specific strategic plans or policies have been developed to guide the organisation. The organisation's strategic direction is determined based mainly on the intuition of the organisation's founder(s)/owner(s)/senior managers. This direction evolves as circumstances warrant, as the organisation succeeds or fails in its activities. Organisational strategies have tended to emerge as the organisation learns from its experiences.	1
The organisation has a broad strategic plan in place, but this plan is considered a loose guide and is not strictly adhered to, and tends to change as the organisation succeeds or fail in its activities. This plan contains no specific, detailed action plans or programmes that the organisation is expected to implement. Strategies have tended to develop and emerge over time.	2
The organisation has developed a strategic plan, which includes specifically developed means, but this plan is considered a loose guide, which is either ignored, or loosely followed. The plan contains no specific, detailed action plans or programmes that the organisation is expected to implement.	3
The organisation has a carefully developed strategic plan, detailing on a step-by-step basis a number of specific actions and programmes the organisation is implementing, or will implement in order to achieve its objectives, and thus accomplish its ends. This plan, developed after careful deliberation, it typically fully formed and complete once the planning cycle is finished, <u>The organisation is currently implementing this plan, but expects (and allows for) non-material changes as implementation proceeds.</u>	4
The organisation has a carefully developed, comprehensive strategic plan, detailing on a step-by-step basis a number of specific actions and programmes the organisation is implementing, or will implement in order to achieve its objectives, and thus accomplish its ends. This plan, developed after careful deliberation, is typically fully formed and complete once the planning cycle is finished. <u>The organisation is currently implementing this plan, as outlined.</u>	5



2. Please indicate the **one** statement which **best describes** your organisation's strategic plan:

current

Office use only

V27

No specifically developed strategic plans of any substance	1
A broad, general statement of organisational plan and policies, with no detailed action plans or programmes that can be or are used to direct organisational activities or monitor organisational performance. Plans are not considered complete once the planning cycle is finished, but tend to evolve as circumstances warrant.	2
Mostly a broad, general statement of organisational plans and policies, but with some action plans or programmes which are not detailed enough to direct organisational activities or monitor organisational performance	3
A statement of organisational plan and policies, with some detailed action plans or programmes which are considered fully formed and complete at the end of the planning cycle, and are used to direct organisational activities and/or monitor organisational performance	4
A comprehensive, written, detailed, complete statement of organisational plans and policies, containing specific action plans and programmes which are continually referred to to direct organisational activities and monitor/measure organisational performance. Plans and programmes are linked to strategic goals and objectives, and compensation is partly based on performance against plan.	5

3. Please indicate how your organisation's means are communicated to organisation members. Please select the **one** statement that **best describes** your organisation:

V28

No specific effort is made to communicate organisational means to organisation members. Only those directly responsible for developing the means need to know of their contents.	1
Through informal discussion/word of mouth, in a broad, general fashion	2
Through formal meetings, where organisational means are communicated verbally	3
Through the distribution of documents explicitly containing firm means	4
Through the distribution <u>and</u> informal discussion of documents explicitly containing organisational means	5
Through the distribution <u>and</u> formal discussion of documents explicitly containing organisational means	6



4. Indicate *in general* the specificity of your organisation's 'means'.
For example, very specific means would describe exact plans or programmes the firm must implement, and set out on a detailed basis the steps required to achieve implementation. Typically, management's major task (once the means are suitably developed and articulated) would be to measure performance against plan. Very unspecified means would be broad, general statements of an organisation's strategic intention, with little detail or steps intended to guide specific organisational action.

Please indicate the **one** statement which best describes your organisation's means.

1	2	3	4
Very unspecified	Generally unspecified	Generally specific	Very specific

V29	
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Strategic ends and means flexibility

5. Please select the **one** statement that indicates how often your organisation's *mission/fundamental business purpose* are changed or altered:

Almost continuously, as conditions and circumstances warrant.	1
Often, say every six months or so.	2
Quite often, say every 1-5 years	3
On a specific planning time cycle, for example annually, or every two years	4
Occasionally, say every 5-10 years	5
Seldom, say every 10-20 years or so	6
Never. The organisation's <i>mission/fundamental purpose</i> have remained the same since the organisation's inception	7

V30	
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6. Please select the **one** statement that indicates how often your organisation's *ends* are changed or altered:

Almost continuously, as conditions and circumstances warrant.	1
Often, say every six months or so.	2
Quite often, say every 1-5 years	3
On a specific planning time cycle, for example annually, or every two years	4
Occasionally, say every 5-10 years	5
Seldom, say every 10-20 years or so	6
Never. The organisation's ends have remained the same since the organisation's inception	7

V31	
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7. Please select the **one** statement that indicates how often your organisation's *means* are changed or altered:

Almost continuously, as conditions and circumstances warrant.	1
Often, say every six months or so.	2
Quite often, say every 1-5 years	3
On a specific planning time cycle, for example annually, or every two years	4
Occasionally, say every 5-10 years	5
Seldom, say every 10-20 years or so	6
Never. The organisation's <i>means</i> have remained the same since the organisation's inception	7

V32	
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SECTION D: ORGANISATION PERFORMANCE MEASURES

1. Please select the **one** choice in each line which you feel **best** indicates how *your* organisation currently compares to competitors in your organisation's primary industry – according to percentage quartiles. If not applicable, select the choice included for this purpose. Please be as accurate and objective as possible.

Characteristic	Not applicable	(Bottom) Quartile 1 0-25%	Quartile 2 25-50%	Quartile 3 50-75%	(Top) Quartile 4 75-100%
	0	1	2	4	5
Overall profitability or financial performance	0	1	2	4	5
Share price performance	0	1	2	4	5
Overall organisational performance/success	0	1	2	4	5

V33	
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V34	
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V35	
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2. Please rate your organisation's performance according to the factors listed in 1-6 below, applying the following scale:

		Low	Moderate	High	Very High
1	Overall effectiveness of your strategy formation and strategic planning processes	1	2	3	4
2	Degree of satisfaction among top management with your organisation's strategy formation/strategic planning processes	1	2	3	4
3	Degree of satisfaction among all the organisation's members with your organisation's strategy formation/strategic planning processes	1	2	3	4
4	Positive effects of your organisation's 'ends' and 'means' on overall firm competitiveness	1	2	3	4
5	Degree to which your organisation's 'ends' provide goals to effectively guide and stimulate the organisation's actions and behaviours	1	2	3	4
6	Degree to which your organisation's 'means' provide effective competitive strategies to influence/direct the organisation's behaviour, and enable the organisation to effectively and successfully compete	1	2	3	4

V36	
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V37	
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V38	
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V39	
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V40	
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V41	
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SECTION E: APPROACH TO STRATEGY

Consider how strategy is formed in your organisation and your organisation's approach to strategy. Study the idea carefully and mark your opinion.

Choose the **one** statement that you rather support and then determine the strength by marking **either** a 1 or 2 for the left hand statement **OR** a 3 and 4 for the right hand statement.

For example:

	Agreement strength				
	Strong	Weak	Weak	Strong	
<i>Statement 1</i>	1	2	3	4	<i>Statement 2</i>

	Or		
<i>Statement</i>		<i>Statement</i>	
Rather long term focus		Rather short term focus	V42
1	2	3	4

	Or		
<i>Statement</i>		<i>Statement</i>	
Predictability and consistency is most important in strategy		Flexibility and creativity is most important in strategy	V43
1	2	3	4

	Or		
<i>Statement</i>		<i>Statement</i>	
Low degree of risk taking is preferred		Greater degree of risk taking is preferred	V44
1	2	3	4

	Or		
<i>Statement</i>		<i>Statement</i>	
High degree of comfort with stability is preferred		Ambiguity and unpredictability is acceptable	V45
1	2	3	4

	Or		
<i>Statement</i>		<i>Statement</i>	
Primarily autonomous or individual behaviour is preferred		High level of cooperative, interdependent behaviour is preferred	V46
1	2	3	4



	<i>Statement</i>		Or		<i>Statement</i>			
	Top-down approach to strategy is typical	1	2	3	4	Bottom-up approach to strategy is typical	V47	

	<i>Statement</i>		Or		<i>Statement</i>			
	The CEO determines the strategy	1	2	3	4	High degree of participation and empowerment is prevalent	V48	

V49	
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