

**EXPLORING THE RELATIONSHIP BETWEEN STRATEGY
CONSULTANTS AND STRATEGY TOOLS USING GROUNDED
THEORY: A STRATEGY AS PRACTICE PERSPECTIVE**

by

PHILIP P. MCLACHLAN

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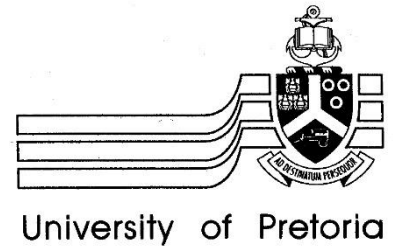
UNIVERSITY OF PRETORIA

Supervisor:

Dr. R. Maritz

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Declaration Regarding Plagiarism

I declare that this Doctoral dissertation, which I hereby submit for the degree Doctor of Philosophy in Business Management at the University of Pretoria, is my own work and has not previously been submitted by me for a degree at another university.

Ethics Statement

The author, whose name appears on the title page of this thesis, has obtained, for the research described in this work, the applicable research ethics approval. The author declares that he has observed the ethical standards required in terms of the University of Pretoria's Code of ethics for researchers and the Policy guidelines for responsible research.

DEDICATION

Dedicated wholeheartedly to my parents - my mother Petra and late father Danie “Mac” McLachlan. I will never comprehend the sacrifices you have made in order to give us both the invaluable opportunity of tertiary education, and to be able to excel in life. Nothing has ever been too much to ask of you. Your unconditional love for us has meant the world to me and I am forever grateful to have, and to have had, you as my parents.

***“I am the master of my fate,
I am the captain of my soul.”***
- William Earnest Henley -

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Soli Deo Gloria!

ABSTRACT

Strategy consultants act as catalysts of contemporary social change. They shape the global economy through strategies of some of the world's largest organisations, yet little is known about their strategising practices, particularly in employing strategy tools. The purpose of this study was to generate theory that will contribute to understanding the interplay between strategy consultants and their use of strategy tools in everyday strategising. In line with a broader practice turn in social sciences, the study adopts the strategy as practice perspective and conceptualises strategy as something an organisation does, therefore focusing on activities and practices of the strategist that constitute strategising. Grounded theory is employed as qualitative methodology, complemented by in depth interviews with eleven strategy consultants. Five conceptual categories were deduced that aid in exploring the interplay between strategy consultants and their use of strategy tools. Drawing upon several practice and practice-based theories, the study enhances understanding of the professional identity of the strategy consultant in practice and explores the interplay the strategy consultant has with strategy tools. The study presents novel insight into strategy tool selection strategies, the dimensions of boundary spanning activities in using strategy tools as boundary objects, the nature of strategic information finding activities in pursuit of strategic outcomes, and the mediating role of knowledge, language and structures. The findings and theoretical integration of the grounded categories into existing strategy as practice literature contributes to our understanding of the strategy consultant as strategist and the relationship with strategy tools as material artefacts in strategising.

Keywords: grounded theory, strategic management, strategising, strategy, strategy as practice, strategy consultant, strategy tools.

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GLOSSARY

This study covers a number of concepts, namely: deductive reasoning, grounded theory, inductive reasoning, interpretivism, management consultant, memoing, positivism, practitioner, reflexivity, strategy, strategy as practice, strategy consultant, strategy tools, substantive theory, theoretical sampling and theoretical saturation. The definitions of these concepts are listed below as they appear within this document.

Deductive reasoning – Deductive reasoning creates particular conclusions derived from general premises.

Grounded theory – Grounded theory is a qualitative research method that creates a conceptual framework (or a theory) from empirical data through the use of inductive analysis.

Inductive reasoning – Inductive reasoning allows one to draw conclusions from evidence or facts.

Interpretivism – The interpretivist paradigm employs inductive reasoning strategies to explore and understand and eventually leads to abstraction to inform explanation.

Management consultant - Management consultants advise corporations on their strategy and operations, with the goal of improving organisational performance.

Memoing - Memoing (in grounded theory) is concerned with the more formal way in which the researcher captures his or her ideas, questions or arguments about the data, categories and its dimensions and other hunches or enlightenment about the data during its analyses.

Positivism – The positivism/post-positivism paradigm (also called the scientific method or empirical science) is mostly associated with quantitative research in a research setting whereby deductive reasoning is employed in order to test hypotheses and generalise results.

Practitioner – The practitioner in the strategy as practice framework is the organisational individual who performs the activity of strategising and who carries its associated practices.

Reflexivity – The ability of the researcher to critically reflect on how his/her perspective and researcher-participant interaction might affect the process of analysis and therefore the forthcoming results.

Strategy – Strategy is mostly associated with areas such as the long-term direction of the organisation, the concentration or the scope of the organisation's activities, the organisation's advantage over its competitors, the strategic position the organisation occupies within its environment, the resources and capabilities of the organisation to compete, as well as the values and expectations of influential actors within the organisation.

Strategy as practice – Conceptualising the doing of strategy as a practice, the strategy as practice perspective is part of a broader turn in the social sciences towards the intense studying of practices and how they constitute social reality.

Strategy consultant – A subset of management consultant.

Strategy tools – Strategy tools can be defined as “any methods, models, techniques, tools, frameworks, methodologies and approaches which provide decisions support”.

Substantive theory – A substantive theory accounts for an empirical area of sociological enquiry.

Theoretical sampling – Theoretical sampling (in grounded theory) suggests that cases should be pursued that occur over several different contexts in order to provide constant comparison between cases and contexts.

Theoretical saturation – Theoretical saturation occurs when the researcher does not find any new facts or ideas from subsequent interviewees in order to saturate the grounded theory categories that have been developed.

EXPLORING THE RELATIONSHIP BETWEEN STRATEGY CONSULTANTS AND STRATEGY TOOLS USING GROUNDED THEORY: A STRATEGY AS PRACTICE PERSPECTIVE

CHAPTER 1: INTRODUCTION

1.1 BACKGROUND

It was in the 1930s when the United States based *Business Week* introduced to the world the professional service of *management consulting*¹ (McKenna, 2006:8). Since its introduction to the corporate world, management consulting has seen tremendous growth worldwide (Whittington, 2002:1). Idealised with high professional status and credibility, management consultants in professional consulting firms are known to solve ambiguous and complex organisational issues for organisations through capitalising on their sources of leading knowledge, professional reputation and a seemingly advanced relational competence (Fincham & Clark, 2002; Werr & Styhre, 2002). The work of management consultants has been traditionally directed towards an organisation's executive management or leadership as its client, and its orientation towards the future environment suggests that their consulting work is mainly strategic in nature (Fincham & Clark, 2002).

The second "wave" of management consultants – strategy consultants – gained prominence and legitimacy in the years after the emergence of management consultants (David, 2012:72). During the 1960s, strategy consulting reached the pinnacle of its dominance within the consulting industry and would subsequently lead to evolutionary institutional changes (McKenna, 2006 in David, 2012:72-73). As a subset of management consultants, strategy consultants are core to the production, transfer and innovation of strategic praxis (organisational activity) and practices (social and organisational) within the contemporary world of work (Whittington, 2006:625). Strategy consultants are acclaimed for their influence

¹ Management consultants advise corporations on their strategy and operations, with the goal of improving organisational performance (David, Sine & Haveman, 2013:357).

on the modern world as they act as key catalysts of contemporary social change (Sturdy, 2011:517). Fincham and Clarke (2002:1) mention that strategy consultants have contributed to “millions” of employees having to change the way in which they work, subsequently altering the character of contemporary organisations. They are further recognised for their role in the introduction (Anand, Gardner & Morris, 2007), alteration (Sturdy, 2011) and institutionalisation (McKenna, 2006:210) of strategic practices, therefore shaping the corporate strategies of some of the world’s largest organisations, as well as the global economy (Fincham & Clarke, 2002). In the broader strategic management literature, there is increasing interest in the role and value of strategy consulting and its subsequent influence on organisational or corporate strategies (McKenna, 2006). However, to date there remains only a relatively small number of studies investigating the influence of strategy consultants on the strategy process in general, of which most are empirically outdated and are therefore of questionable relevance (e.g. Bloomfield & Danieli, 1995; Bracker & Pearson, 1985; Knights & Morgan, 1991). Some literature has perhaps been more critical of strategy consultants, such as the interrogation of analytical techniques used by strategy consultants (Hayes & Abernathy, 1980), their ambiguous and sometimes controversial relationships with organisations (Werr & Styhre, 2002:44) and their seemingly short-term focus, instead of developing long-term competitiveness for organisations (Ghemawat, 2002:51).

Kaiser and Kampe (2005:3) provide a general representation of the earlier literature on strategy consultants in terms of the research focus, classifying these contributions into the management of the professional consulting firm itself (e.g. Alvesson, 1993; 1995), the ethical and professional issues associated with strategy consulting work such as conduct, obligations, expectations and impact on managerial action within the organisation (e.g. Greiner & Metzger, 1983, Armbruester & Kipping, 2001; Clark & Greatbatch, 2002; Faust, 2002) and lastly a research focus on the processes of consulting work and relationships, incorporating issues such as the value of consulting (e.g. Delany, 1995), consulting processes (Greiner & Metzger, 1983) and professional relationships between consultants and their clients (Devinney & Nikolova, 2004; Sturdy, 1997; Werr & Styhre, 2002). However, there is a general absence in the current strategic management literature of an explanation of exactly how the strategy consultant influences strategic activity in organisations, specifically with a focus on how things are done in the context of developing or formulating strategy. Through contributions by authors such as Clark (2004) it is suggested that strategy

consultants contribute to strategy by creating strategic knowledge, but the impact of this influence has remained largely under-researched, specifically with reference to the skills, knowledge and capabilities of the strategy consultant and the practices they employ within the contemporary organisation (Kaiser & Kampe, 2005; Whittington, 2002).

In order to contribute to the knowledge of strategy consultants and their skills and practices employed, this study turns towards a contemporary and exciting development in the strategic management literature by adopting the perspective of strategy as a *practice*, which is rooted within the social sciences - called the strategy as practice perspective. Conceptualising the *doing* of strategy as a practice, the strategy as practice perspective is part of a broader turn in the social sciences towards the intense studying of practices and how they constitute social reality (Whittington, 2006:614). Adopting a practice-based lens to study strategy has been particularly useful to bridge the complex dichotomies and dualisms of the traditional strategic management literature such as macro outcomes and micro actions, deliberate and emergent strategy as well as agency and structure (Paroutis, Heracleous & Angwin, 2016:4). It is theoretically underpinned by several practice-based theories such as structuration theory, activity theory, actor-network theory and even routines and capabilities (Nicolini, 2012). The strategy as practice perspective has opened the so-called *black box* of the organisation by illuminating our understanding of *who* participates in enacting strategy (i.e. the strategy consultant) and *how* strategy is enacted on a daily basis (Schmid, Floyd & Wooldridge, 2010:142).

Conceptualising strategy therefore as a conglomeration of social practices (Ezzamel & Willmott, 2004) allows one to reduce the notion of strategy to the level of those who practice strategy (the practitioners) as they act and interact within their daily activity (Wilson & Jarzabkowski, 2004). Strategy as practice therefore focuses on the actual activity that takes place on a daily basis that leads to strategic activity, such as the situations, interactions and interpretations observed in the work of the practitioner (Kaiser & Kampe, 2005:11). By adopting the strategy as practice perspective, we can begin to understand how practitioners produce strategy through these interactions, not only with each other, but also between themselves and the practices present within the strategic context (Jarzabkowski, 2003:24). The paradigm of strategy as practice, however, should not be confused with the unit of a single practice or even multiple practices. Strategy as practice refers to the way in which

practices are skilfully organised or sequenced in order to give rise to strategic activity. Strategy as practice therefore also refers to the way how strategic practices are interpreted and applied through action and interaction (Kaiser & Kampe, 2005:8). As a particular strategic practice among strategy consultants (Kaiser & Kampe, 2005:9), the use of strategy tools has long been part of the typical way in which strategists have conducted their strategy work (Jarzabkowski & Whittington, 2008). The strategy as practice perspective also incorporates a prominent focus on strategy tools as the objects embedded within strategy, and upon which practitioners draw to enact strategy (Jarzabkowski, Spee & Smets, 2013:41). Scholars such as Clark (1997), Dyson (1990) and Langley (1989) have long highlighted the fundamental use of strategy tools in the formulation of strategy and they have become essential as social practices for producing strategic activity or praxis (Whittington, 2006:620).

1.2 PROBLEM STATEMENT

During the initial *a priori* systematic review of the current literature in strategic management pertaining to strategy consultants and their use of strategy tools with the aim of formulating a broad research objective, it has become apparent that there is a critical gap in the body of knowledge that could explain the interplay between the strategy consultant and the consultant's use of a strategy tool in their strategy work. Although some of the literature has valued the role of the strategy consultant, the consultant's expertise and application of ideas, tools and strategic practices (Armbrüster & Glückler, 2007), there is still a general lack of knowledge of the influence of the strategy consultant on organisational strategy. This is evident in both the broader traditional strategic management literature as well as the contemporary practice turn² of the strategy as practice domain (Jarzabkowski, 2005; Jarzabkowski, Balogun & Seidl, 2007; Johnson, Langley, Melin & Whittington, 2007). Although a few empirical contributions within the strategy as practice literature have focused on the internal organisational practitioners of strategy such as the organisation's executive or leadership team (Angwin, Paroutis & Mitson, 2009), research on the role of middle managers (Mantere, 2008; Rouleau, 2005; Rouleau & Balogun, 2011; Suominen & Mantere,

² The practice turn is concerned with incorporating practice into academic disciplines in advancing arguments beyond the existing problematic dualisms that plague these disciplines (Schatzki, 2001:10).

2010) or strategy champions (Mantere, 2005), issues in strategy such as the role of power (McCabe, 2010; Samra-Fredericks, 2005), discursive constructions (Laine & Vaara, 2007) and formal structures such as formal strategy committees (Hoon, 2007), studies on strategy consultants and the external practitioner in general (such as the business school lecturer or strategy guru) are much less prevalent and many no longer considered empirically relevant.

Some of the more recent and appropriate published literature include Kaiser and Kampe (2005), who set out to enhance theoretical understanding of the strategy consultant's strategic practices by developing a classification framework of the strategy consultant's practices in consulting by identifying several strategic practices and their influence on both the theory and practice of strategy consulting. Other papers have set out to categorise strategic actors within family firms by notion of the Simmelian Stranger (Nordqvist, 2011) and another set out to develop a theoretical management consultant liabilities framework within the strategising process (Pretorius & Stander, 2012). However, adopting the strategy as practice paradigm and analysing the body of knowledge under the practice perspective may bring about new ways in which the role of strategy consultants can be conceptualised, examined and explained. Strategy as practice allows for a fuller understanding of *how* strategy consultants engage, act and interact within their social environments by analysing their human practices in the broader context of social sciences (Schatzki, Cetina & Savigny, 2001).

1.3 RESEARCH OBJECTIVE

The primary objective of this study is to explore the interplay between strategy consultants and their use of strategy tools in their everyday strategy consulting work.

This doctoral thesis, in the context of the preceding problem statement, does not set out to present a theoretical argument in order to develop and test hypotheses or to develop and argue for conceptual propositions based on the current literature. Rather, it aims to conduct empirical observations and generate theoretical knowledge through the application of an exciting and innovative qualitative methodology that has previously been confined to studying behaviour in the social sciences, called grounded theory. By adopting grounded theory as theory-generating methodology, the study sets out to produce in-depth knowledge

around the phenomenon of the strategy tools in practice, by focusing specifically on strategy consultants and their relationships with strategy tools. At the onset of data collection, it sets all preconceived notions, theoretical knowledge and presuppositions aside and engages with strategy consultants in creating understanding around the subject of using strategy tools in their strategy work.

1.4 IMPORTANCE OF THE RESEARCH

The study contributes to the broader strategic management literature by providing an alternative perspective on strategy. In particular, it contributes to generating new knowledge about strategy consultants and strategy tools through adopting a strategy as practice lens. Rooted within the social sciences, a practice perspective provides new in-depth, rich, qualitative information about the interplay between strategy consultants and the strategy tools that they use in their everyday strategy consulting work. By applying the strategy as practice paradigm or perspective, the study contributes to a relatively new area of empirical investigation within the strategy as practice domain. The study provides an academic contribution in at least three very distinctive and important ways:

- Firstly, the study applies a relatively new theoretical paradigm called the strategy as practice perspective which is rooted in social sciences (Vaara & Whittington, 2012:286). The practice perspective provides new ways of analysing and understanding the phenomenon of strategising and therefore contributes to a new way of understanding strategy as a practice under the broader strategy literature.
- Secondly, the study employs the lesser known, qualitative methodology of grounded theory to investigate the interplay between strategy consultants and their strategy tools. Strategy as practice scholars such as Langley (2014) have argued for the importance of the interpretation of strategists' verbal account of their strategic practice in empirical investigation, and grounded theory is well positioned to produce new knowledge through intensive interviewing of strategists. Grounded theory as methodology possesses the ability to provide new theoretical categories or concepts with their associated properties and/or dimensions that are firmly rooted in the empirical data obtained directly from strategists.
- Thirdly, the study focuses exclusively within the South African context of strategy consulting, an area that is not only neglected, but on which very little theoretical and

empirical knowledge exists. There has been a recent uptake of the strategy as practice perspective among South African scholars, such as (but not limited to) investigating how South African middle managers perceive their strategic roles within their respective organisations (Jansen van Rensburg, Davis & Venter, 2014), understanding the impact of managerialism on university managers and their strategy work (Davis, Jansen van Rensburg & Venter, 2016) and exploring the strategising practices of chartered accountants within the South African mining industry (Grebe, Davis & Odendaal, 2016). However, there are no known studies in a South African context that adopt the strategy as practice perspective and focus on South African strategy consultants. The study therefore contributes to generating and building theory that may refine existing theories and provide contextual understanding of local academic relevance. Strategy consulting (including management consulting) has become a more prevalent and specialised professional service in South Africa in recent years. The consulting industry has perhaps seen more unfavourable publicity in recent years due to the involvement of larger consulting firms in controversial South African government projects (Bogdanich & Forsythe, 2018), but their popularity and prominence seem to be on the increase as many historically financial service-oriented firms such as Deloitte and PriceWaterhouseCoopers (PWC), have (alongside a plethora of smaller, boutique-type niche consulting firms) entered the consulting market, offering their professional consulting services to various industries (PWC, 2019).

1.5 METHODOLOGY

One of the most important decisions in conducting this study, was the selection of the most appropriate research methodology that will answer the research question or pursue the research objective best (Petre, 2010; Trafford & Leshem, 2008). The choice of research methodology was also critical for the execution of this research as the methodology provides critical structure and framing of the entire research study, including the research design, engagement with participants and prescriptions on how the empirical data should be collected and treated throughout the analysis.

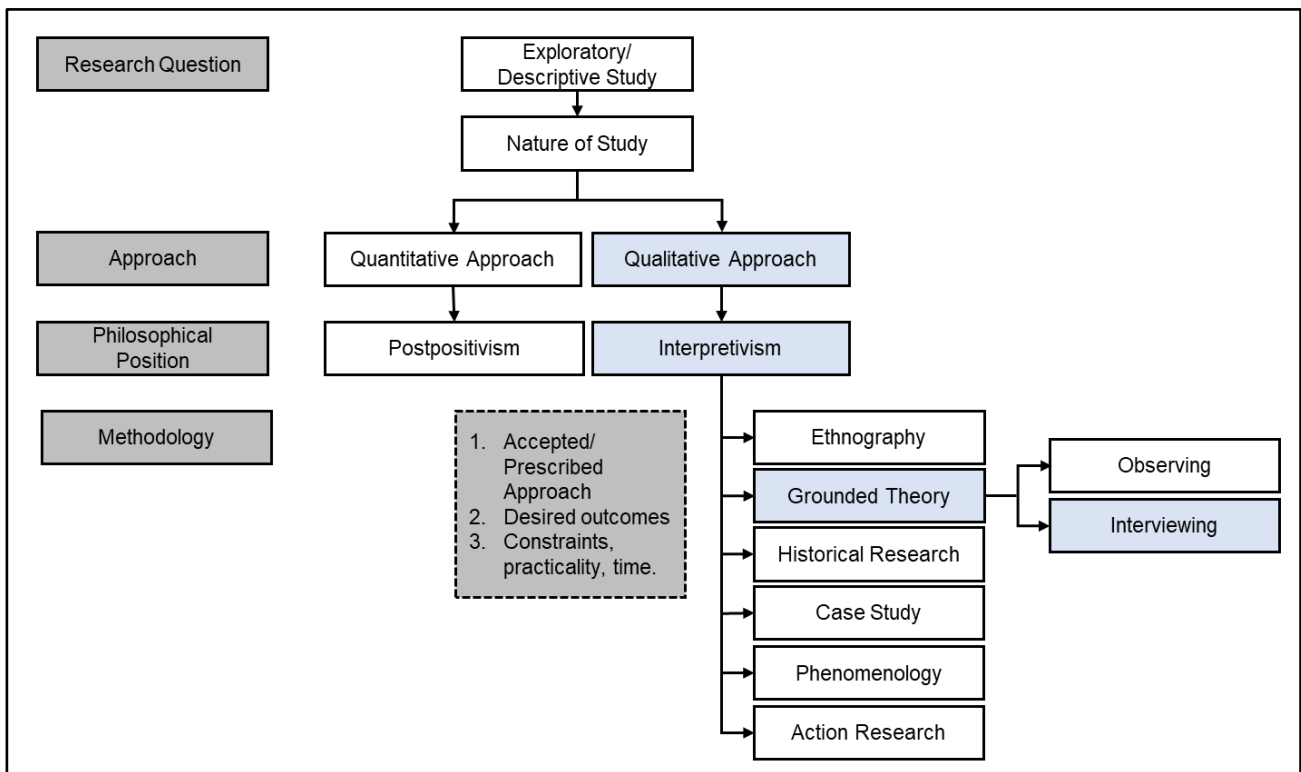
As the research objective for this thesis is predominantly exploratory and subsequently descriptive in nature, the study relied heavily on qualitative inquiry, as prescribed by Cooper

and Schindler (2014:129). It should be kept in mind that the adopted theoretical perspective of strategy as practice prescribes post-positivism or interpretivism as most appropriate themes of knowledge in approaching the research (Langley, 2014), and that strategy as practice is mostly concerned with actions, activities and processes of practitioners of organisational strategy (Johnson, Melin & Whittington, 2003). The chosen methodology should also satisfy the required theoretical contribution to practice-based theories, on which the strategy as practice domain relies (Langley, 2014). Mills (2014) prescribed various qualitative methodologies that are most appropriate for the prescribed post-positivist or interpretivist perspective of strategy as practice, including ethnography, grounded theory, historical research, case study, phenomenology and action research. Considering the various outcomes of these proposed qualitative methodologies, only the methodologies of *grounded theory* and *action research* satisfied the requirements of the research objective in foregrounding knowledge of both process and outcome. Figure 1.1 below illustrates the high-level approach that was followed in order to choose an appropriate methodology for this study.

In considering all limitations, practical constraints and the nature of the data that could be collected to pursue the research objective, grounded theory strongly emerged as the most appropriate research methodology, as it:

- satisfied the requirements for choosing a sound methodology for a doctorate degree level,
- satisfied the prescription of seminal strategy as practice authors advocating for the use of grounded theory as an appropriate methodology, and
- emerged as a suitable methodology for the interpretivist nature of this research.

Figure 1.1: Choosing an appropriate methodology



Source: Own illustration.

What was deemed a revolutionary methodological approach (Charmaz, 2006:4), grounded theory - as the chosen research methodology - can be described as “the discovery of theory from data” (Glaser & Strauss, 1967:1). Charmaz (2006:187) describes grounded theory as a qualitative research method that creates a conceptual framework (or a theory) from empirical data through the use of inductive analysis. The name *grounded theory* is derived from the approach where the analytical categories that are developed through this method, are “grounded” within the empirical data that is obtained (Charmaz, 2006:187). It is important to note that the concept of grounded theory is in fact twofold: grounded theory refers to both the methodology of grounded theory (including the distinctive grounded theory strategies), and the product of the methodology – the theory that is developed from the emerging categories or concepts (Charmaz & Bryant, 2010:406).

Grounded theory employs certain “systematic methodological strategies” that have proliferated to various disciplines and professions (Charmaz, 2014:1075), which can be described as “systematic, but flexible, guidelines for data gathering, coding, synthesising, categorising, and integrating concepts for the explicit purpose of generating middle-range theory” (Charmaz & Bryant, 2010:406). Glaser and Strauss advocate for researchers to use

these original grounded theory strategies in a flexible manner, following their principles only as guidelines (Charmaz, 2014:16).

In line with this recommendation, the study employs these grounded theory strategies to elaborate on existing middle range theory, rather than creating or developing substantive theory which is more in line with the original aim of grounded theory. According to Glaser and Strauss (1967:32), a substantive theory accounts for an empirical area of sociological enquiry. Middle range theory as developed by Merton, is concerned with producing general theory of society. It rejects both narrow empiricism as well as abstract theorising and rather focuses on the middle level of generality (Sztompka, 2003:29-30).

The specific methodological strategies of grounded theory which are adopted in this study that distinguishes it from other qualitative approaches include the strategies of data coding, memo-writing or *memoing* and employing theoretical sampling, among other grounded theory strategies that are employed and comprehensively discussed in Chapter 5. Perhaps the most distinguishable element of grounded theory as methodology is its distinctive premise as an inductive, *theory discovery* methodology, which is rooted in its ability to develop theoretical explanations of distinguishable features of an emerging phenomenon whilst simultaneously grounding the theory within empirical observation (Charmaz & Bryant, 2010:406; Remenyi, 2014:4).

Following the publication of their book on grounded theory called *Discovery* (1967), Glaser and Strauss, as pioneers of grounded theory, discovered that they had, in fact, several philosophical and fundamental theoretical differences in their approach to grounded theory. Due to their opposing sociological research traditions of positivism and pragmatism, two major perspectives of grounded theory emerged, diverging into what is termed the *Glaserian approach* and the *Straussian approach* to grounded theory, each displaying significant differences (Howard-Payne, 2015:52). The Straussian approach to grounded theory represents a more informal approach due its constructivist nature (see paragraph 6.3.2), whereas the Glaserian approach follows a more rigid, classic post-positivist approach.

For the purpose of this study, the Straussian approach to grounded theory was adopted for various reasons, particularly, to adhere to the nature and prescriptions of a Doctoral study

which require an extensive literature review and problem framing prior to conducting any research, thus conforming more to the constructivist orientation of the Straussian approach rather than the more classic and formal Glaserian approach.

The most notable differences between the Straussian and Glaserian approach pertaining to this study are in relation to the role of the researcher (more active role in generating data), the role and timing of the literature review (*a priori*, but reconsidered and refined later during the data analysis), the formulation of the research question (prior to employing grounded theory) and the coding and analytical processes (simultaneous collection and analysis through intensive interviewing) employed (Howard-Payne, 2015:52-57).

While Remenyi (2014:13) describes grounded theory as a rigorous process, Remenyi also emphasises its flexibility, which allows the researcher to explore opportunities in discovering emergent data through a systematic and guided approach. Although the grounded theory methodology represents a systematic process, the reiterative and emergent nature makes it difficult to lay out the step-by-step process that was followed (Remenyi, 2014:147). Analytic connections could occur at any instance during the research and therefore prompts the researcher to stop, and explore ideas whenever these occur (Charmaz, 2014:18). With the premise of grounded theory as a flexible process, Remenyi (2014:38) points out that no two researchers will apply grounded theory in the exact same way and Locke (2001:33) therefore encourages the researcher to use his or her creative and intellectual imagination in formulating theory that is rooted in the empirical data (2001:33).

In line with the *interpretivist* perspective adopted for the study, interviewing as the data collection method was deemed most appropriate in order to discover interpretations of the social reality of participants, which would only be possible by talking to participants (Langley, 2014). The method of data collection therefore entailed the intensive interviewing of eleven participants, with the qualifying criteria being client-facing strategy consultants who have used a strategy tool within the last six months during a strategic consulting engagement with any client. With the strategy as practice perspective foregrounding the role of the individual as strategist in the practice of strategy (or strategising), it was imperative to interview and collect data on individuals and their strategising practices when using strategy tools. In line with a Straussian perspective on grounded theory, interviewing was conducted by the

researcher who had a more complete understanding of the strategy consulting phenomenon, allowing for a greater level of theoretical sensitivity (see paragraph 6.3.10).

The intensive interviewing allowed for gently guided conversations to explore the participant's experience with the topic and to obtain detailed responses that enrich the depth of the data collected on the phenomenon (Charmaz, 2014:56). The questions used were mainly formulated to guide the conversation around the phenomenon, rather than to explicitly frame or elicit specific answers. The researcher relied on open-ended questions to probe and interrogate unanticipated areas of inquiry, as suggested by Charmaz (2014:56). As the research objectives had to be clearly delineated before the study commenced, the boundaries of interviewing were already established. However, the researcher still allowed concepts and categories to emerge organically from interviews, rather than introducing theoretical concepts and categories prior to eliciting responses from the participants.

An initial six strategy consultants were interviewed in order for the researcher to determine the most prominent and relevant emerging codes, concepts and categories and the subsequent six interviews therefore were conducted by using theoretical sampling (see paragraph 6.3.8) as grounded theory strategy, i.e. theoretically selecting participants for a wider representation of the phenomenon over various contexts. Subsequent interviews were conducted until such time the researcher observed a notion of theoretical saturation (see paragraph 6.3.9), but due to the limitation of this study in terms of size, time available, scope and institutional prescription, theoretical saturation cannot be confirmed in an absolute sense. Notwithstanding the rigidity, systematic approach and validity of the process, Strauss and Corbin (1990:292) argue that "sometimes the researcher has no choice and must settle for a theoretical scheme that is less developed than desired". Since this study contributes to building and enhancing theory, rather than creating a substantive theory to explain the entire phenomena, this limitation is recognised but does not influence the integrity of the research.

In accordance with the prescriptions of grounded theory, simultaneous data collection and data analysis were conducted throughout the data collection phase. By employing the grounded theory strategy of coding, the researcher was able to code data segments during the two main phases of open coding (also called initial coding) and focused coding (also called selective coding) after each interview (Charmaz & Bryant, 2010:410) to identify

emerging and important categories that could be subsequently explored, and to widen the representation of the phenomenon over more contexts thereby increasing the depth of the data. It is important to note that the coding process was not a simple and linear process, but rather an intense, emergent process through which the researcher constantly moved back and forth between naming, comparing and changing the codes according to new data. After each round of coding, the researcher moved towards a higher level of abstraction in order to deduce conceptual categories, properties or dimensions to build on the existing practice theories that are identified during the literature review. Together with several rounds of coding in order to deduce the most important and relevant concepts or categories, the researcher also employed the grounded theory strategy of *memoing*, which is concerned with the formal (yet spontaneous) tabling of the researcher's theoretical ideas, questions and arguments during the data collection and analysis. Memoing allows a researcher to increase productivity, expedite the analytical work and it brings about new insights or new ideas throughout the analytical process (Charmaz, 2014:72). Memos produced through memoing may remain for private use by the researcher or may become an analytic feature in the coding of data. The memos produced during this study pertained more to thought generation (Charmaz, 2006), and were subsequently used to elicit information during the intensive interviewing phase, structure ensuing coding and analysis, and for critical interrogation during the theory building stage. The coding phases produced five emergent categories with their associated dimensions or properties:

- Definition of strategy consulting
- The strategy consultant in professional practice
- Choosing strategy tools
- Organising infrastructure of strategy tools, and
- Information finding.

1.6 STRUCTURE OF THE THESIS

This doctoral thesis incorporates a more traditional, prescribed approach to the structure of the academic dissertation as opposed to the suggested alternative methods for structuring academic papers developed with the use of the grounded theory methodology. Whilst the grounded theory methodology argues the varying nature and the place of the literature review, the traditional academic dissertation and institutional guidelines prescribe a

comprehensive literature review of academic argument, from which hypotheses or propositions are deduced for empirical application and testing. This is usually followed by a comprehensive overview of the methodology, after which the empirical findings are introduced, followed by an integrative theoretical discussion. In order to comply with institutional guidelines, this thesis follows the prescribed traditional approach for structuring the doctoral dissertation. However, the presentation of chapters might differ in terms of the nature of the chapter or the way knowledge is presented, and how the academic contribution (rather than academic argument) is subsequently structured through the systematic introduction of theoretical concepts and categories that emerged through the systematic application of the methodology. As the grounded theory methodology allows the researcher to organically develop an understanding of a subject area or phenomenon and requires no preconceived or presupposed concepts of social reality or knowledge (Jones, Kriflik & Zanko, 2005:1), it follows a more inductive approach that allowed the researcher to explore the emerging phenomenon systematically and in-depth.

This thesis commences in Chapter 2: with a high-level overview of the current broader strategy literature with a specific focus on the perspective of strategy process, which provides the fundamental context for understanding the origin and nature of the adopted theoretical perspective of strategy as practice. It should be noted that the purpose of Chapter 2:5 are not to provide complex academic argument through the presentation of relevant literature, but rather to provide an overview of the most appropriate literature that will enhance the understanding of the adopted strategy as practice perspective within the remainder of this study. Although the broader field of strategy research can be divided into strategy content, strategy context and strategy process, this thesis foregrounds only strategy process and subsequently roots the origin of strategy as practice firmly within the micro perspective of the traditional broader strategy process field. It provides a broad overview of the more complex and prominent dichotomies of the strategy process literature such as the issues of deliberate strategy and emergent strategy, rational strategic decision making of individuals and irrational strategic decision making of individuals, the prescriptive writings of strategic management and the descriptive writings of strategic management as well as the macro perspective of strategy and the micro perspective of strategy. Lastly, it provides a description of the micro perspective of strategy as the fundamental departure to understanding the subsequent chapter.

Chapter 3: provides a detailed overview of the strategy as practice literature, particularly describing the theoretical developments in the strategy as practice literature in its contextual setting as part of the broader practice turn in the social as well as the management sciences. This chapter introduces a helpful theoretical framework for studying strategy as practice with reference to the main theoretical elements of strategy as practice, namely practitioner, praxis and practice. It conceptually describes the nexus of strategy as something that organisations or people *do* through the interplay between the practitioner, praxis and practice, and incorporates the use of materials or *things* that practitioners use as they *craft* their strategy.

Chapter 3 is followed by Chapter 4: which provides an overview of some of the multitude of theoretical perspectives underpinning the strategy as practice perspective, foregrounding only what was deemed the most prominent and beneficial theoretical contributions for understanding the theoretical notion of *practice* in the broader practice theory and its application in the strategy as practice paradigm. These theoretical perspectives include broader practice theory (e.g. Schatzki and Reckwitz), practice-based theories such as structuration theory (Giddens), Bourdieu's habitus, capital and field, activity theory (Vygotsky), Wittgenstein's concept of the language game, Foucauldian perspectives on discursiveness and materiality and others, including a narrative approach to strategy, situated learning, the Carnegie Tradition, sensemaking, routines and capabilities, actor-network theory and institutional theory. It then continues to provide an overview of the current strategy as practice research agenda as proposed by prominent seminal strategy as practice authors Jarzabkowski and Spee (2009) in a practical and useful matrix of practitioner and praxis, placing this study firmly into a useful theoretical classification scheme on which very little theoretical and empirical knowledge exists. Lastly, Chapter 4: provides a summary of the most recent peer-reviewed, published academic contributions within the strategy as practice domain, as proposed by the online international community of strategy as practice scholars.

Chapter 5: provides a current representation of the relevant literature on *strategy tools*, which is a concept identified from the conceptual framework of strategy as practice as presented in Chapter 3. As strategy as practice (and practice theory in general) is concerned with *people* doing things (in this context, strategy) with *stuff*, strategy tools are identified and

classified as something practitioners use in their doing of strategy. The chapter firstly introduces strategists as the practitioners of practice in the context of strategic management and subsequently distinguishes between strategy practitioners internal to the organisation and strategy practitioners external to the organisation. It provides a definition of *strategy tools* and describes the practical application of strategy tools from a practice perspective. Subsequently, the chapter sets out to briefly describe several prominent theoretical perspectives on strategy tools within the strategy as practice paradigm, including strategy tools as technologies of rationality, strategy tools as boundary objects, strategy tools as activity, epistemic cultures and strategy tools, strategy tools and visual theory and lastly the relation between strategy tools and strategy infrastructure. The chapter ends the literature on strategy tools by providing a synthesised summary of strategy tools as classification scheme of strategy tools and their applications to use in practice.

Chapter 6: is dedicated to an in-depth overview and explanation of the research design and the qualitative methodology of grounded theory, which was employed to conduct this study. It starts with providing a brief overview of the research design through several appropriate descriptors, before continuing to explicitly lay out the ontological and epistemological views on which this study is based. It then proceeds to introduce the methodology of grounded theory by providing an in-depth discussion of grounded theory and its practical relevance to the research objectives of this study, and lays out a visual illustration of the grounded theory process. It recognises that the approach is not simple and linear as the visual would suggest, but rather more complex and emergent – though rigid and systematic. The chapter continues to introduce the distinct grounded theory strategies that were employed for this study to build on existing theory, namely coding, constant comparison, memoing, theoretical sampling, theoretical saturation and theoretical sensitivity. Throughout the description and explanation of these grounded theory strategies, practical examples from the study are given to illustrate how the researcher employed these to generate five emergent categories or concepts with their dimensions and/or properties. Chapter five finishes with a demonstration of how the quality and rigour of this qualitative research was ensured and concludes with an overview of the ethical principles that were followed to ensure the integrity and ethics of this study.

Chapter 7: systematically introduces the qualitative findings of the methodology that was followed for the study at hand. It introduces the qualitative findings per emergent category

and aims to describe the category together with its associated properties and/or dimensions of the coding processes that were followed to arrive at the various categories that are introduced. Although many categories and concepts emerged throughout the simultaneous data collection and analysis, only the most frequent, prominent and relevant categories were selected for building onto the existing theory, rendering the researcher with five categories that are introduced and discussed, namely a definition of strategy consulting, the professional identity of the consultant in practice, choosing strategy tools, organising infrastructure of strategy tools and lastly, information finding.

Following the introduction of the empirical qualitative findings, Chapter 8: aims to provide a theoretical integration of the empirical findings into the current relevant theory within the strategy as practice domain, by foregrounding general practice theory and activity theory as appropriate theoretical paradigms that not only provide theoretical explanation for the empirical phenomena, but also serve as a basis for the ensuing theoretical arguments on the interplay between strategy consultants and strategy tools. Whilst the aim of this chapter is not necessarily of explanatory nature (the study is deemed as exploratory and descriptive), it attempts to integrate the empirical findings in a useful manner to stimulate critical thought on relationships between variables of both activity and practice frameworks.

Lastly, Chapter 9: provides a comprehensive summary of the study and theoretical contribution, as well as the importance of this academic research to the body of knowledge on strategy as practice. It utilises the limitations, challenges and critical thinking for this doctoral thesis as a departure point to provide several recommendations for future research on the relationship between strategy practitioners and strategy tools as well as strategy as practice in general.

1.7 CONCLUSION

This doctoral thesis sets out to explore and discover new knowledge on the emerging theoretical paradigm of strategy as practice and incorporates new approaches and perspectives from other disciplines to enhance the knowledge on contemporary strategic management in an ever-changing world of work. By focusing on strategy consultants as practitioners external to the organisation who have an influence on the strategy of the

organisation, the study sets out to generate theory on the interplay between strategy consultants and the strategy tools they use in their daily work of strategy consulting. The theoretical underpinnings of this study relate largely to broader practice theory and incorporates practice-based theories such as structuration theory and activity theory in order to explain emerging categories and concepts that are developed using grounded theory strategies. This study is mostly exploratory in nature and is therefore limited only to what emerged during data collection, with a specific focus on the use of strategy tools. It acknowledges that a few limitations exist for this study but makes ample effort to mitigate the impact these limitations might have on the credibility and the reliability of the qualitative findings from which theory is subsequently developed.

CHAPTER 2: STRATEGY

This chapter provides a broad overview of the current strategy literature and the broader categorisation of research perspectives pertaining to strategy. It commences by providing an overview of strategy before distinguishing between the most prominent research perspectives of strategy content and strategy process. With strategy process providing for the bulk in contribution to strategy research, it is further unpacked into the most prominent and often dichotomous perspectives of research within the strategy process domain, such as, strategy formulation and strategy implementation, deliberate strategy and emergent strategy, strategic decision making and strategic change and lastly the macro and micro perspective on strategy.

2.1 INTRODUCTION

Contemporary organisations face a plethora of challenges in an era of global economic turmoil. Due to the inability to adapt to an ever-changing environment, many organisations have simply perished while others demonstrated the exceptional ability to survive some of the toughest economic downturns. This exceptional ability of certain organisations to stand the test of time raises questions about the “inner workings” of these organisations, particularly in answering why some organisations perform superior to others, even when faced with the same challenges as the rest of the industry it operates in. Organisational managers are continuously encouraged to look for and adapt practical prescriptions that guide their managerial actions through these economic challenges towards profitability and exceptional performance. The applicable content of these prescriptions that managers could adapt within their business environment is then contained and formalised in the organisation’s *corporate strategy* (Pitt & Koufopoulos, 2012:4).

There are diverse definitions of strategy in the strategic management literature. Most of these definitions represent a rather ambiguous nature of strategy and subsequently strategy research with their opposing viewpoints as to what exactly strategy entails. Many definitions have an integrated perspective between the economic viewpoint of strategy, and the organisational viewpoint of strategy and there are seemingly standard elements that define the concept of *strategy*. Johnson, Scholes and Whittington (2008:2-3) argue that strategy is

mostly associated with areas such as the long-term direction of the organisation, the concentration or the scope of the organisation's activities, the organisation's advantage over its competitors, the strategic position the organisation occupies within its environment, the resources and capabilities of the organisation to compete, as well as the values and expectations of influential actors within the organisation. Pitt and Koufopoulos's (2012:6) definition of strategy takes a more hybrid perspective between a behavioural and economic definition, defining strategy as "the pattern of decisions in a company that determines or reveals its objectives, purposes or goals, produces the principal policies and plans for achieving those goals, and defines the range of business the company is to pursue, the kind of economic and human organisation it is or intends to be, and the nature of economic and non-economic contribution it intends to make to its shareholders, employees, customers, and communities". Most definitions of strategy also enable one to operationalise the measurable elements of strategy such as the organisation's "mission, policies, business definition, organisational definition, organisational objectives, internal strengths and weaknesses, opportunities or threats that arise from the environment, key success factors to ensure effective competition, organisational decisions, defining capabilities, planning and scheduling, implementation of strategic efforts and the development of sustainable competitive advantage" (Sadler, 2003:10). Some other definitions of strategy from prominent authors in the strategy literature are listed below in Table 2.1.

Table 2.1: Definition of Strategy

Author	Definition	Keyword
Andrews (1971:52)	"Corporate strategy is the pattern of decisions in a company that determines and reveals its objectives, purposes, or goals, produces the principal policies and plans for achieving those goals, and defines a range of business the company is to pursue..."	Pattern
Chandler (1962:13)	"The determination of the basic long-term goals and objectives of an enterprise, and the adoption of courses of action and the allocation of resources necessary for carrying out these goals"	Plan
Farjoun (2002:570)	"the planned or actual coordination of the firm's major goals and actions, in time and space, that continuously co-align the firm with its environment"	Planned/Actual coordination
Johnson <i>et al.</i> (2008:3)	"Strategy is the direction and scope of an organisation over the long term, which achieve advantage in a changing environment through its configuration of resources and competences with the aim of fulfilling stakeholder expectations"	Direction
Mintzberg (1987:67)	"a plan of some sort, an explicit guide to future behaviour"	Plan

Author	Definition	Keyword
Mintzberg & Waters (1985:257)	“a pattern in a stream of decisions”	Pattern
Nag, Hambrick & Chen (2007:947)	“The field of strategic management deals with the major intended and emergent initiatives taken by general managers on behalf of owners, involving utilization of resources, to enhance the performance of firms in their external environments.” (Presented as a consensual definition derived from management journals)	Intended and emergent initiatives

Source: Own comparison.

2.2 STRATEGY RESEARCH

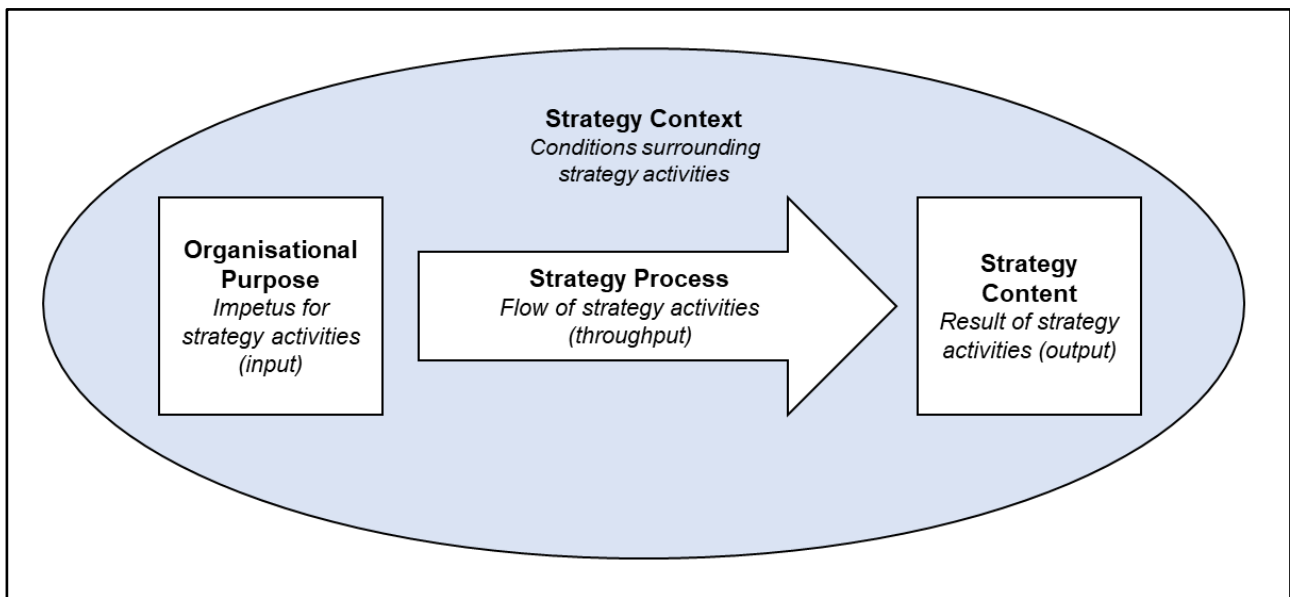
Strategic management is a discipline that incorporates and emphasises the role of organisational actors (also called practitioners) within strategy. It is important to realise that strategy involves people who participate in formulating, and act in implementing strategy (Johnson *et al.*, 2008:11). This discipline therefore differs from other elements of management in a few distinct ways. Whereas management on an operational level is more concerned with the active management of functional business areas such as management of human resources, the manufacturing of goods, the monitoring of the organisation’s financial performance or improving of customer service. Whereas strategic management deals with the more complex and ambiguous situations that arise out of the organisation with its state of affairs and routines (Johnson *et al.*, 2008:11). Strategic management therefore relies on the conceptualisation of these ambiguous issues and subsequent decision-making within the organisation based on these. It also emphasises the understanding of these complex issues and concepts that enhance the practitioner’s understanding, and subsequent analysis and action of a strategy (Johnson *et al.*, 2008:11). The evolution of strategic management research provides very interesting insight into the different eras of strategy as it has evolved into the 21st century. It should be noted at this stage, that the strategy research literature as a whole is not necessarily internally unified as many perspectives exist in the field of strategy and strategic management (Windsor, 2010:47).

Although the scope or variety of topics and perspectives in strategy research is broad, perhaps the most prominent distinction between strategy literature from the second half of the 20th century and beyond divides strategy into what can be distinguished as the strategy

content approach and the *strategy process approach* (De Wit & Meyer, 2005; Hutzschenreuter & Kleindienst, 2006; Johnson *et al.*, 2008; Pettigrew & Whipp, 1993). This prominent distinction was pioneered by leading seminal strategy authors such as Chandler (1962), Ansoff (1965) and Andrew (1971) and continues to provide a helpful perspective to structure and understand the abundance of strategy literature that has become available over the past few decades. The strategy content literature stream is concerned with the method in which a competitive advantage is developed: the “what” element of strategy, whilst the strategy process literature stream relates to the formulation and implementation of strategy: the “how” element of strategy (Papadakis, Thanos & Barwise, 2010:31). Whilst the content approach is more concerned with planned strategic activities through the formal strategy planning processes that organisations conduct, the process approach is focused on the strategic decisions and change processes as practitioners try new ideas, and is often also called the *emergent* or *realised* approach (Johnson *et al.*, 2008:17; Sadler, 2003:3 & Thompson & Martin, 2010:34).

Another helpful distinction is the application between formal approaches that are more rational of nature in the content approach and incremental approaches that are more informal, in the strategy process approach (Fahey & Christensen, 1986; Leong, Snyder & Ward, 1990). It should be emphasised that the strategy perspectives of process and content are not separate parts of a strategy, but rather distinguishable elements of strategy that aid in comprehending the strategic problem situation (De Wit & Meyer, 2010:5; Schendel, 1992:2). This interactive perspective between strategy process and strategy content is portrayed in Figure 2.1 below. It is important to understand that the dimensions interact with and influence each other strongly, e.g. the process or processes associated with a specific strategy will have a strong impact on the content of the adopted strategy, whereas the content of a specific strategy will specify or delineate a specific process or processes associated with developing the strategy (De Wit & Meyer, 2010:6).

Figure 2.1: Dimensions of strategy



Source: Adapted from De Wit & Meyer (2010:5)

As the process literature in strategy research provides the perspective on “how” strategy is conducted, it provides a strong theoretical point of departure for the subsequent theoretical discussions of strategy research, whilst systematically moving towards the adopted perspective of strategy as a practice, on which this study ultimately focuses. As discussed in the ensuing literature, strategy process focuses on the events, actions and relationships (Pettigrew, 1992) rather than states of strategy as contained in the strategy content literature, and therefore links strongly to the strategy as practice perspective which focuses on detailed activity and actions in strategy.

2.3 STRATEGY PROCESS

The discipline of management (and therefore, strategy) has historically been researched with a strong process approach (e.g. Schendel & Hofer, 1979:11). Influenced by scholars from often different traditions such as Rumelt, Schendel and Teece (1991:26), who called for more dynamic explanation of the strategy process approach, the scholarly focus on strategy eventually moved towards the notion of “becoming”, which lead to argument on what should be included within strategy process research (Pettigrew, 1992:5). The strategy process literature regards strategy as a complete process (Chia & Mackay, 2007:218) and aims to answer the question of how the strategy of an organisation comes into existence by

focusing primarily on the actions and strategic decisions that lead to the development of a strategy (Huff & Reger, 1987:212). The strategy process literature evolved from the primary stream of strategy content literature and has contributed to the broader strategy literature in various ways. There are many different perspectives and contributions within the strategy process literature itself that aim to give us insight into this complex phenomenon (Hutzchenreuter & Kleindienst, 2006:674; Sminia, 2009:97), such as the strategic decision-making view and the strategic change view of strategy process (Pettigrew, 1992:6).

However, strategy as process itself cannot be studied from a unified perspective as the process literature is rather diverse and cannot be incorporated within one, single paradigm (Pettigrew, 1992:7). Van de Ven (1992:169), one of the most prominent seminal authors in the strategy process literature, defines process from three different viewpoints:

- A *logic* that explains a causal relationship between variables,
- A *category* of concepts/variables that refers to actions of individuals/organisations, and
- A *sequence* of events that describes how things change over time.

Each of these definitions are associated with particular parts of strategy process research, but it is the last definition (*sequence*) which is seen as probably the most prominent in process research as it resembles the “heart” of the strategy process (Sminia, 2009:99). This definition sees the strategy process as a “developmental event sequence” (Langley, 1999 in Sminia, 2009:99) which becomes central to understanding the strategy process literature when compared to variance studies in the sense that the unit of analysis in the strategy process changes over time (Monge, 1990 in Sminia, 2009:100). Central to the process research is a distinct characteristic of producing a “story” that reflects the reading of the strategy process theory, in a sense that events form a more chronological order (Langley, 1999 in Sminia, 2009:100). This literature stream focuses mostly on the processual formulation of strategy, but also on the implementation phases within the areas of strategic planning, strategic choice, strategic change as well as strategy practice (Johnson *et al.*, 2011:11).

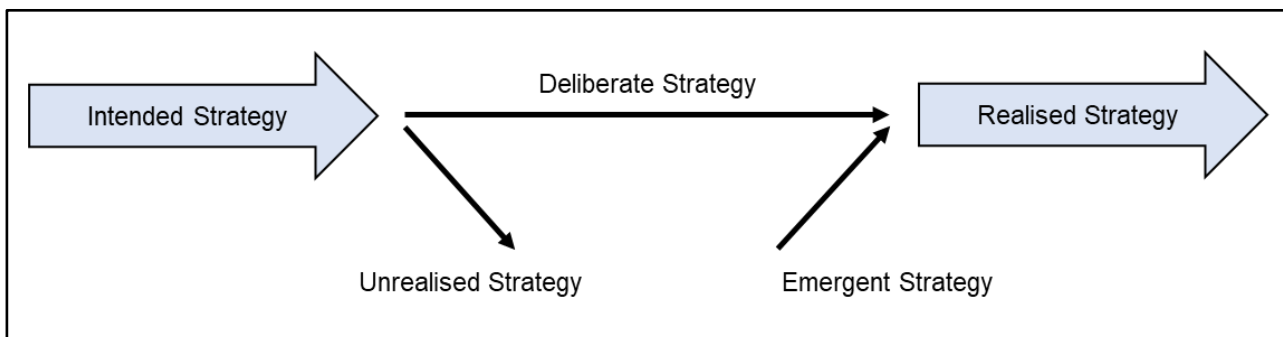
Although the strategy process literature can further be segmented into several theoretical developments, for the purpose of this study and to provide theoretical context for the ensuing chapter, only the perspectives of deliberate versus emergent strategy and the macro view versus micro view of strategy is considered, as the micro perspective of strategy (also

referred to as the microfoundations of strategy) becomes the theoretical departure for the subsequent perspective of strategy as practice.

2.3.1 Deliberate vs Emergent Strategy

A major segmentation of perspectives on strategy research distinguishes between strategy as deliberate phenomenon and strategy as emergent phenomenon. Perhaps Mintzberg and Waters (1985) as seminal authors in strategy research explain best how strategy can be separated into its different perspectives. Mintzberg and Waters studied strategy for more than 10 years in order to identify certain patterns of actions in streams of behaviour that constitute organisational strategy. They named this phenomenon *realised* strategy. After identifying the realised strategy, Mintzberg and Waters then examined the origins of these strategies and aimed to identify the relationship between the original intent of the organisation and what the organisation actually achieved in terms of its realised strategy. This original strategic intent was named *intended* strategy. In comparing the realised strategy to the intended strategy allowed for Mintzberg and Waters to further identify the notion of *deliberate* strategies (realised and intended) as well as *emergent* strategies, those strategies that came into existence in the absence of explicit organisational intent (as the case is with intended strategy). The concepts of deliberate and emergent strategy have since become central within strategy research (Mintzberg & Waters, 1985:257). A visualisation of how both deliberate strategy and emergent strategy comes about in organisational strategy is depicted in Figure 2.2 below.

Figure 2.2: A continuum of emergent strategy development processes



Source: Mintzberg & Waters (1985:258)

Deliberate strategy comes about as the product of decisions that are taken mostly by top management or the upper echelons (Johnson *et al.*, 2011:397). This perspective of strategy is also known as the rational view of strategy development and most of the process research has been dedicated to researching this type of strategy making as patterns within a stream of strategic decisions (Mintzberg, 1972; Mintzberg & McHugh, 1985). These strategic decisions could be identified and related to what organisations did in practice to explore the relationships between the formalised plans and the strategy that was achieved. Strategy has historically been believed to be conceived in terms of the planning conducted by the upper echelons and was therefore treated mainly as an analytic process of determining long-term goals, followed by implementation planning (Mintzberg & Waters, 1985:257). However, according to Mintzberg & Waters (1985:258), for these organisational strategies to be purely deliberate, there would be certain conditions that would have to be satisfied:

- The intentions of the executives must exist and be articulated in detail,
- All these intentions must have been shared with all organisational actors, and
- These collective intentions must be understood exactly as they were originally made explicit, and no external force should have interfered with these.

Considering rationally that these conditions in practice would perhaps never be satisfied optimally, one can deduce that it is unlikely that perfect deliberate strategies exist in organisations (Mintzberg & Waters, 1985:258). However, on the other hand of the spectrum, purely emergent strategies are just as seldom. In reality (as Mintzberg and Waters argue), organisations are more exposed to a compromise between free choice of strategy and pre-determined strategy (Mintzberg & Waters, 1985:268).

2.3.1.1 Sources of deliberate strategy

Johnson *et al.* (2011:397) argue that deliberate strategies might be established from three different sources:

- Strategies established through individuals in certain leadership positions,
- Strategies formulated through formal strategic planning systems, and
- Strategies that are imposed on organisations by powerful external stakeholders.

Strategies established through strategic leadership are mainly the outcome of leadership, command or vision of individuals who often play an executive role in the organisation (e.g.

Carroll, Levy & Richmond, 2008). These individuals mostly possess referent power where their personality or reputation allow them to dominate strategy development processes when seen as central to strategy. Their influence over the strategy development process may manifest via different perspectives in the organisation, and include their strategic leadership as command, vision, decision-making or symbolism (Johnson *et al.*, 2011:398-400; O'Regan & Ghobadian, 2004:79).

The second way through which intended strategies can be developed is the use of formal strategic planning systems within the organisation. These planning systems are usually characterised by their systemic, articulated procedures to develop the strategy of the organisation (Ghobadian, O'Regan, Thomas & Liu, 2008:2; Johnson *et al.*, 2011:400). The use of formal planning systems mostly play a role in how the strategy is eventually formulated, and has also been found to play certain roles within the organisation, such as the ability to formulate long-term organisational objectives, stimulate organisational learning through the activities of questioning and challenging the status quo and to communicate the intended strategy of the organisation by establishing shared strategic objectives (Langley, 1988). Formal planning systems have also been found to play a psychological role among organisational actors in that they create ownership among actors and provide a sense of security to the organisation (Johnson *et al.*, 2011:402).

A third way in which deliberate strategies come to existence is when strategies are deliberately imposed from the outside on an organisation, either by powerful stakeholders or by the environment itself, regardless of the organisation's own internal controls (Johnson *et al.*, 2011:398, 404; Mintzberg & Waters, 1985:268). These imposed strategies are usually formulated elsewhere through various mechanisms such as systematic strategic planning by influential stakeholders, or perhaps by governmental regulation of an organisation or its operating sector (Miller, Hickson & Wilson, 2008:613). Organisations might find themselves being constrained to choices determined by their parent company or venture capitalists, or even by merely being subject to governmental requirements (Johnson *et al.*, 2011:404).

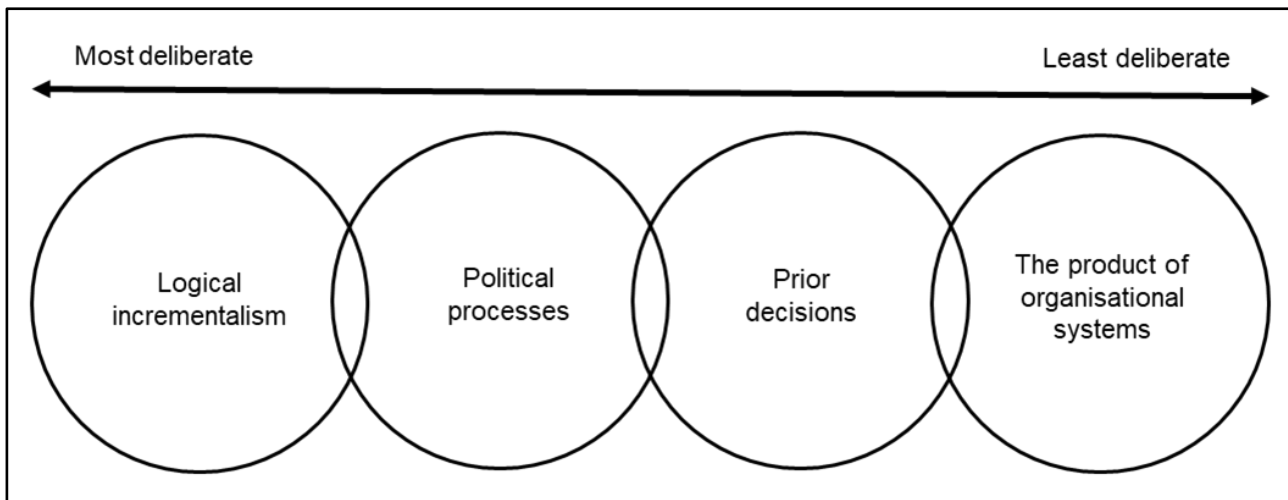
2.3.1.2 Sources of emergent strategy

The second view of strategy is that organisational strategies tend to not develop through formal planning as is the case with deliberate strategy, but tend to emerge organically within organisations over a longer period of time in the absence of intention about these strategies (Mintzberg, 1985:258). It is rather challenging to envision an organisational strategy where action is taken with a complete absence of intentionality and, therefore, pure emergent strategies are just as rare as pure deliberate strategies. Rather, Mintzberg and Waters (1985:258) argue that one could expect to find strategies that exhibit tendencies in the direction of either deliberate or emergent, rather than a pure form of either perspective.

The perspective on emergent strategy sees it as a pattern or series of strategic decisions, which only develop and become apparent over time (Andersen & Nielsen, 2006:97; Johnson *et al.*, 2011:404). Although organisations may use formal planning tools in an attempt at rational examination of their strategic decisions along with appropriate resource requirements and to document these in their corporate strategy plans or reports (Chenhall, 2005:24), the emergent strategy perspective argues that the emerging strategy actually influences and informs this plan or corporate report – and not the plan or corporate report which develops the strategy itself (Johnson *et al.*, 2011:404).

Johnson *et al.* (2011:405) present four different explanations for the development of emergent strategy in the organisation as a continuum of emergent strategy development processes, as illustrated in Figure 2.3 below. These include emergent strategy arising from logical incrementalism, political processes, prior decisions and as product of organisational systems. They argue for a commonality among these different explanations that arise from emergent strategies developing from daily and routine activities within the organisation, which disregards strategy-making as a totally distinct and isolated activity within the organisation (Johnson *et al.*, 2011:398).

Figure 2.3: Perspectives on emergent strategy



Source: Johnson *et al.* (2011:405)

Emergent strategy in its most deliberate form can be explained by the concept of logical incrementalism, which aims to bridge the intentionality and emergence of corporate strategies. It is concerned with how an organisation's management may intentionally exploit an experimental environment to allow organisational strategies to emerge, rather than formulating strategies as complete, grand plans (Johnson *et al.*, 2011:405; Quinn, 1980:9). Logical incrementalism also relies heavily on *organisational learning* whereby an organisation regenerates based on its inherent knowledge and skills in an environment that encourages organisational actors to challenge and question the status quo (Andersen & Nielsen, 2006:103; Johnson *et al.*, 2011:406). Organisational learning can be defined as "a learning process within organisations that involves the interaction of multiple levels of analysis (individual, group, organisational, and inter-organisation" (Tsang, 1997 in Popova-Nowak & Cseh, 2015:300).

The second source of an emergent strategy is derived from the politics within the upper echelons of the organisation. Within the organisation, managers are individuals with agency and therefore prone to position themselves in such a manner that their views on the strategy prevail, or they might seek out ways in which they can control organisational resources to enforce their social and political status in the organisation (Christensen, Dhaliwal, Boivie & Graffin, 2015:1918; Johnson *et al.*, 2011:406). This view of emergent strategy explains how strategies evolve as the product of negotiation and bargaining between several interest groups, internal and external to the organisation. It therefore suggests that the supposed

rational or analytical decision-making processes which are inherent to strategy are therefore not as objective as they would appear to be. Rather, decisions taken, and objectives established are the intention(s) or ambition of powerful interest groups, and they may also influence which strategic issues are ultimately prioritised (Pettigrew, 1977). However, the influence of politics and power on strategy can also be examined in a positive way (Kurchner-Hawkins & Miller, 2006:329-330). As political tension and opposing issues create conflict in political activity, this conflict can act as a source of new ideas, or challenge the traditional ways of doing things in the organisation. These ideas or tensions may be able to stimulate innovation or become a dynamic capability that develops an organisation's competitive advantage – ultimately the influence of power could become an important element in shaping strategy and managing strategic change (Johnson *et al.*, 2011:408).

A third explanation for strategy as being emergent, is concerned with strategy as the product of decisions that were taken prior to and subsequently to inform the development of the strategy. An explanation for this type of emergent strategy lies in the theory that managers prefer continuity of strategy and therefore will deliberately seek to maintain an existing strategy (Laroche, 1995:71). In this managed continuity, each strategic decision is informed by a previous strategic decision, ultimately developing a more established strategic approach (Johnson *et al.*, 2011:410). Path-dependent strategy development is a less deliberate perspective of managed continuity in the sense that previous strategic decisions and events would establish policy paths by which organisational actors would abide during strategic decision-making (Thietart, 2016:776). The organisational culture could also influence strategy development through the behaviour and routines of the organisational individuals. The underlying force of decision-making is the taken-for-granted assumptions in the organisational culture that guide or define how organisational individuals exhibit behaviour and routine activity (Janićijević, 2012). This ultimately shapes the future of the strategy by establishing cultural boundaries and producing patterns of continuity that are only rationalised by organisational managers subsequently (Johnson *et al.*, 2011:411).

The fourth and last explanation of emergent strategy is based on the organisation's systems. Here, the focus shifts to the lower-level managers and examines their ways of dealing with ambiguous problems through their existing ways of doing things (Langfield-Smith, 1997). Managers are expected to be influenced by established organisational systems and processes which they deem as most familiar. Both the resource allocation process and

attention-based view explanations in strategy development, account for strategy emerging from organisational systems (Ocasio, 1997). These views relate to the existing ways in which organisational resources are distributed to solve organisational and strategic problems. Another explanation by Burgelman (1994) refers to the application of familiar organisational systems that form the basis for sensemaking of strategic issues as well as organisational systems providing a basis of solution to strategic issues (Johnson *et al.*, 2011:411).

2.3.2 Macro vs micro perspective

In close relation to the definition of strategy (i.e. the organisation's long-term direction, organisational activities, its competitive advantage, strategic position, resources and capabilities), the strategy literature in general has historically focused on the performance or success of an organisation as a whole: a perspective that is termed the macro view of strategy (Guerras-Martín, Madhok & Montoro-Sánchez, 2014:71; Molina-Azorín, 2014:102). For instance, seminal authors of strategy literature such as Chandler (1962) and Ansoff (1965) have focused solely on the organisation as the unit of analysis in their work (Guerras-Martín *et al.*, 2014:72). On the other hand, recent specialisation and theoretical developments in the fields of strategy and organisational sciences (such as March and Simon, 1985 and Cyert and March, 1963) have led to an opposing view of strategy, understood as a micro phenomenon (Aguinis, Boyd, Pierce & Short, 2011:396; Guerras-Martín *et al.*, 2014:72). This micro view of strategy is linked to the individual and/or group within the organisation (Guerras-Martín *et al.*, 2014:71; Molina-Azorín, 2014:102) and recognises that organisations consist of individuals, and that individuals matter as they exhibit certain behaviours within the organisation and therefore impact organisational structures, cultures and capabilities and subsequently the organisational strategy (Felin & Foss, 2005:441; Guerras-Martín *et al.*, 2014:73). The macro view in the strategic management literature is concerned with areas such as business policy and organisational theory, whereas the micro view in the strategic management literature is concerned with areas such as organisational behaviour and human resource management (Aguinis *et al.*, 2011:396). Historically, with a macro focus on organisational structure, culture and capabilities, the focus on the individuals that constitute an organisation has been lost in much of the strategic organisation and strategy research (Felin & Foss, 2005:441).

2.3.2.1 The micro perspective of strategy

The interest and recent turn to the micro view of strategy is not confined only to the strategic management literature, but part of a general turn towards micro-perspectives in the broader social sciences, as well as other economic and management fields (including economics and finance) which have already considered the micro elements of the discipline (Molina-Azorín, 2014:103). The aim of this turn in strategy research is to apply knowledge harnessed from other disciplines such as psychology, organisational behaviour and the broader social sciences to better understand core issues in strategy (Guerras-Martín *et al.*, 2014:73). For instance, research from psychology has started to influence the strategy literature through establishing linkages such as behavioural theory, sensemaking and behavioural research to strategy (Powell, Lovallo & Fox, 2011:1369). A general interest in cognition as well as strategic decision-making has also resurfaced in the general strategy literature (Schmid *et al.*, 2010:142).

Many authors have also started to highlight the understanding of the individual level as an independent variable in answering complex research questions and understanding collective strategic issues (Molina-Azorín, 2014:103). The ultimate aim, however, is for the strategy literature to offer explanations of organisational level phenomena in relation to micro level enquiry (Schmid *et al.*, 2010:143), i.e. linking macro level and micro level in the organisation. The introduction (or rather re-introduction) of micro level perspectives, commonly referred to as “microfoundations”, is certainly not a new phenomenon. This notion of *microfoundations* is concerned with understanding “how individual-level factors impact organisations, how the interaction of individuals could lead to emergent, collective, and organisational-level outcomes and performance, and how relations between macro variables are mediated by micro actions and interactions” (Felin, Foss & Ployhart, 2015:576). Microfoundations is traditionally connected with concepts such as “reduction” in science as well as the notion of “methodological individualism” that is found in the philosophy of the social sciences (Felin, Foss, Heimeriks & Madsen, 2012:1352).

There have been several calls for research that offers micro-macro linkages, but these efforts remain very scarce and continue to lack appropriate integrative theory (Schmid *et al.*, 2010:143). However, Aguinis *et al.* argue that macro and micro research are both focused on organisations as well as management, and a thorough investigation might reveal perhaps

more similarities than differences between these views. They further argue that it remains crucial to identify bridges between these domains to further stimulate future management research that advances this “bridging agenda” (Aguinis *et al.*, 2011:397). The micro focus on individuals in the strategy literature has its roots in several motivations:

- The micro view creates an opportunity to operationalise complex and aggregate concepts such as strategy, by illuminating the microfoundations of collectives in the organisation,
- By focusing on the individual, potential linkages between micro- and macro level outcomes can be easier established by isolating heterogeneity in the behaviour of individuals,
- The micro view incorporates the issues of individual agency and subjectivity in a contemporary and complex setting, and
- The micro view subsequently informs education as well as practice and make the conditions for competent behaviour explicit in the workplace (Schmid *et al.*, 2010:142).

The strategy process literature is well placed to inform this recent turn in both theoretical and empirical research on the micro level view of strategy (Schmid *et al.*, 2010:142). Strategy process studies the detailed activities or practices as micro-origins that influence strategy content at an organisational level. Since its inception, the process approach has focused on the inside or the “black box”³ of the organisation and has therefore already “humanised” the strategy literature by researching strategic decision making processes and behaviours of both the individual (i.e. the chief executive officer or senior manager) and the collective (Chakravarthy & Doz, 1992; Huff & Reger, 1987 in Schmid *et al.*, 2010:144). Furthermore, the process approach with its concern on patterns of decisions and behaviour of managers and units within the organisation, is dominated by several sociological as well as psychological assumptions (Windsor, 2010:43).

This broad elaboration of the micro-view of strategy process needs a more intellectual endeavour that requires researchers to cross several methodical, theoretical as well as paradigmatic boundaries (Schmid *et al.*, 2010:142). There are many lenses or perspectives that aim to explain this humanised activity in organisations that occur on a micro level, such

³ The “black box” refers to the micro-doings, processes and minutiae that occurs within the organisation’s internal environment (Chia & MacKay, 2007:218).

as the cognitive perspective, the knowledge perspective, the network perspective and the strategy as practice perspective (Jenkins, Ambrosini & Collier, 2007). The strategy as practice perspective with its distinctly micro-approaches has recently become a prominent influence on strategy research, shifting the traditional focus of strategy from something an organisation *has*, to something that people in the organisation *do* (Johnson *et al.*, 2003:3; Whittington, 2006:613). It considers the daily mundane activities of an organisation's employees and the way within which they interact with each other, given the organisational circumstances or context (Chia & MacKay, 2007:223; Carter, Clegg & Kornberger, 2008:88).

The establishment of the strategy as practice perspective suggests two ways in which research can contribute to the understanding of strategy: Firstly, in taking a practice perspective and examining the strategy activity in organisations in detail, and secondly to examine the effect all this activity has on the larger society in which the organisation operates, therefore linking the micro and macro of strategy (Clark, 2004 in Whittington, 2006:613). The strategy as practice perspective also sees strategy itself as some sort of industry which has members (both internal and external to the organisation) who produce practices and strategies that shape the future of organisations and society at large (Whittington, 2006:613). This major theoretical paradigm of strategy as practice within the strategic management literature, is therefore subsequently discussed.

This chapter provided an broad overview of the current strategy literature and the broader categorisation of research perspectives pertaining to strategy. It commenced by providing an overview of strategy before distinguishing between the most prominent research perspectives of strategy content and strategy process. With strategy process providing for the bulk in contribution to strategy research, it was further unpacked into the most prominent and often dichotomous perspectives of research within the strategy process domain, such as, strategy formulation and strategy implementation, deliberate strategy and emergent strategy, strategic decision making and strategic change and lastly the macro and micro perspective on strategy. The next chapter builds on the micro perspective on strategy by introducing and explaining the development and theoretical foundations of the strategy as practice perspective, which focuses on the micro practices of the strategy practitioner.

CHAPTER 3: STRATEGY AS PRACTICE

Chapter 2 provided a broad overview of research perspectives pertaining to strategy research and highlighted the micro perspective of strategy, which is part of a broader turn towards micro-perspectives within the social sciences. The micro perspective is important as theoretical foundation in strategy as practice, as the practice perspective turns the focus towards the individual and its daily practices, and enables the studying of its influence on organisational level outcomes.

This chapter systematically introduces the strategy as practice perspective in strategic management, by encompassing the broader theoretical movement towards understanding the nature of social practices and its influence on strategy, and its perspectives thereof. It provides the theoretical motivation for the prominent development and importance of the strategy as practice perspective before introducing several theoretical underpinnings of the strategy as practice approach that are profound in the current strategy as practice research. The chapter concludes by firstly providing insight into how the strategy as practice research agenda is structured and pursued before providing a comprehensive summary of recent research conducted within the strategy as practice domain, as presented by the international online community of strategy as practice scholars.

3.1 INTRODUCTION

The traditional strategy literature has been conceptually and theoretically divided into dichotomies of thought such as strategy content (e.g. Caves & Porter, 1977) versus strategy process (e.g. Cohen, March & Olsen, 1972), rational strategy (e.g. Langlely, 1989) versus political strategy (Buchholz, 1992), the micro environment (e.g. Cyert & March, 1963; March & Simon, 1958) versus macro environment of strategy (e.g. Ansoff, 1965; Chandler, 1962) and internal capabilities (Grant, 1991) versus external positioning (e.g. Maggard, 1976). These dichotomies have severely constrained our understanding of the actual activities that happen *within* the organisation where strategy is being practiced by individuals (Jarzabkowski, Balogun & Seidl, 2007; Paroutis, Heracleous & Angwin, 2016:4). The strategy as practice perspective aims to overcome these constraints by directing its research

efforts and understanding towards detailed analysis of the activities that actually take place inside the organisation (Golsorkhi, Rouleau, Seidl & Vaara, 2011:1).

In its pursuit of exploring the linkages between the micro-foundations of strategy and macro level outcomes, the strategy as practice perspective continues to build upon several established research traditions such as the pragmatist tradition of the early 1900s (Johnson *et al.*, 2007:4). As part of the greater practice turn in the social sciences (Whittington, 2006:614), the strategy as practice perspective incorporates and offers several schools of thought to study and explain strategising at the micro level, such as philosophy, sociology, anthropology, activity theory, discourse analysis and feminist theory, among others (Golsorkhi *et al.*, 2011:2). The strategy as perspective is characterised by the contribution of new theories and methodological choices from various disciplines and paradigms, and therefore brings about ample differences in epistemological, theoretical and methodological perspectives (Golsorkhi *et al.*, 2011:3; Johnson, Langley, Melin & Whittington, 2007:4), and aim to close traditional dichotomies such as *individualism* and *societism* (Schatzki, 2005 in Whittington, 2006:614). The plethora of perspectives that accompany the multitude of practice-based approaches available presents various opportunities to help strategy research scholars to better understand practices and social activities in the strategy as practice domain (Golsorkhi *et al.*, 2011:).

3.2 STRATEGY AS PRACTICE

The emergence of the strategy as practice approach takes strategy research beyond the traditional theoretical and conceptual dichotomies that saturate the current strategy process approach (Paroutis *et al.*, 2016:4). The current strategy process literature remains fragmented, severely lacks cumulative theory building (Rajagopalan, Rasheed & Datta, 1993 in Paroutis *et al.*, 2016:4) and has been heavily dominated by macro views from the content approach. Scholars have stressed the need for research which could focus on actions and interactions of *individuals* that are part of the strategy process in organisations (Paroutis *et al.*, 2016:4). The development of strategy as practice is part of a larger intellectual movement in the social sciences which is focused on the role of practices in the social reality of organisations (Golsorkhi *et al.*, 2011:2; Johnson *et al.*, 2007:31). This broader movement has brought representation from various disciplines and schools of

thought, which include sociologists such as Giddens (1984) and de Certeau (1984), anthropologists such as Bourdieu (1990), philosophers such as Foucault (1977) and Wittgenstein (1951) and feminist scholars such as Martin (2003), among several others (Golsorkhi *et al.*, 2011:2). The common interest among all scholars to the practice turn is to study what people actually *do* in organisations (Schatzki *et al.* 2001; Reckwitz 2002 in Johnson *et al.*, 2007:31). This *doing* in organisations refers to individuals enacting a practice through directing their “doings, meanings and intentions through both calculation and imagination” (Barnes, 2001; Jarzabkowski, 2004; Jarzabkowski & Wilson, 2006 in Belmondo & Sargis-Roussel, 2015:92). This practice turn in contemporary social theory and its perspective contributes to the field in three areas:

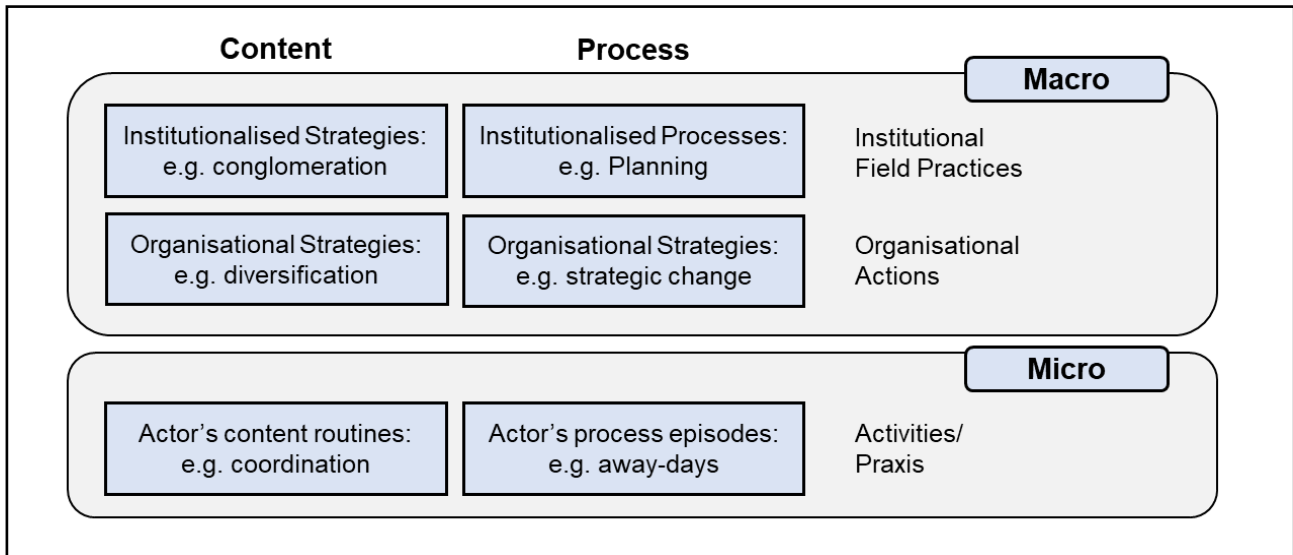
- It provides an opportunity to focus on microfoundations of activities in its social context,
- It offers an alternative to methodological individualism, and
- It explores how social activities are broadly linked to the issues of agency and structure (Golsorkhi *et al.*, 2011:3).

3.2.1 Moving from macro to micro to macro

Strategy as practice as a practice approach, is therefore more focused on the micro foundations that transform organisational strategy through strategic activity, rather than organisational-level or macro explanations thereof (Tsoukas & Chia, 2002 in Balogun *et al.*, 2007:204). It is broadly argued that practices that occur at a specific moment within a particular context differ from what can be examined at the macro level, hence providing a different perspective of doing (Belmondo & Sargis-Roussel, 2015:92). The micro perspective on strategy does not necessarily forego an essential focus on firm performance as a macro outcome, but in addition to sharing a concern for firm performance with traditional strategy research, strategy as practice emphasises the significance of intermediate outcomes that may exist between the micro and macro levels (Balogun *et al.*, 2007:196). Strategy as practice also offers several other macro-level explanations such as the evolution of organisational strategies (Jarzabkowski, 2005; Sminia, 2005), organisational capabilities (Salvato, 2003) or firm renewal (Regnér, 2003), among others (Balogun *et al.*, 2007:204). It can also contribute to macro explanations through analysis of institutionalised practices and its consequences for organisations, such as the phenomenon of alliances (Vaara, Kleymann & Seristö, 2004). Strategy as practice predominantly shifts the focus of strategy research

from the macro-view of organisational actions and institutional practices to the micro-view of activities as depicted in Figure 3.1 below, and represents the strategy as practice domain or notion of what can be termed *strategising*.

Figure 3.1: The micro and macro levels in strategic management research



Source: Paroutis *et al.* (2016:5).

Whittington (2003, in Johnson *et al.*, 2007:6) defines strategising as “the practice of managing strategy”. This shift in focus from macro to micro implies an important analytical building block for pursuing strategy as practice research: scholars may start with examining singular or linear explanations at a micro level, but their ultimate goal should be the development of a holistic theory that embodies the relationships between the macro and the micro level phenomena (Schmid *et al.*, 2010:150). Although most strategy as practice scholars advocate the shift from the macro to the micro in order to advance the broader strategic management field, they also aim to explore the linkages between these microfoundations and macro firm-level or institutional-level outcomes (Jarzabkowski *et al.*, 2007:196; Paroutis *et al.*, 2013:7; Whittington, 2006:614). The linkage between the micro focus and the macro strategic outcomes is an important component as ultimately, we need to be able to link the outcomes of strategising activities, events and behaviours within the firm to more macro-organisational, institutional and, possibly, even broader societal contexts and outcomes (Balogun *et al.*, 2007:196; Whittington, 2006). In order to establish itself as a credible approach within the field of strategic management research, the strategy as practice

field must be clear about the “so what” that comes from the research (Balogun *et al.*, 2007:203).

The linkage between the micro and macro levels of strategy requires one to adopt a practice approach that conceptualises action as it is located within any social structure (Belmondo & Sargis-Roussel, 2015:92). The understanding of this embeddedness of individual action is important in the practice perspective, such as to avoid an overemphasis on individual-level factors (Schmid *et al.*, 2010:150). Practices conceptualised at a macro level usually portray an institutionalised way of working. In contrast, practices conceptualised at a micro level provide a way of working with a reason according to an individual’s own understanding of the world. Such an approach allows us, for example, to link the use of formal strategy tools in an industry to its individual, localised application (Belmondo & Sargis-Roussel, 2015:92). Linking micro and macro levels, however, is not a simple task of linking phenomena in a causal or simplistic linear manner. Scholars need to acknowledge that the strategic setting remains ambiguous and complex and that mutual influences can be encountered not only within, but also across the levels of micro and macro. What starts off as an individual-level of analysis can quickly spawn into a challenging encounter of boundaries of collectives, broader organisational phenomena and multi-levelled theory (Schmid *et al.*, 2010:157-158).

Although practice scholars frequently borrow concepts from other theories and disciplines, they should remain aware of the limitations and challenges this may bring (Markoczy & Deeds, 2009 in Schmid *et al.*, 2010:153). However, practice scholars can also benefit from the application of multiple theoretical perspectives and knowledge from inter-disciplinary efforts (Hitt, Beamish, Jackson & Mathieu, 2007 in Schmid *et al.*, 2010:153). Consistent with the emergence of the broader strategy as practice, scholars may leverage different sociological perspectives in an attempt to link these to macro organisational and institutional settings, such as the strategic discourse efforts of Samra-Fredericks (2003, in Schmid *et al.*, 2010:152), among several others.

3.2.2 Moving from strategy to strategising

Strategy as practice explores the daily social doings of managers through the practices they employ, in order to explain the inner workings of strategy (Jarzabkowski, 2003:24). Whilst

the process approach focuses on the entire process that produces strategy and the content approach focuses on the product or outcome of strategy, strategy as practice shifts the focus towards the “doings” of the practitioner of strategy, mostly the organisational individual. By adopting the strategy as practice perspective, the organisational individual is assumed to be the initiator of the organisation’s strategic activities, as well as its processes and practices that give rise to a flow (or process) of action and ultimately produces strategic outcomes for the organisation (Chia & MacKay, 2007:225-6).

For scholars adopting strategy as practice, social practices have become central in explaining how strategies emerge from the organisation (Chia & MacKay, 2007:219; Jarzabkowski *et al.*, 2007:7). This intense focus on social practices shifts the focus onto the organisational individual who can be assumed to enact deliberately within the organisation, producing certain events or outcomes for the organisation (Chia & MacKay, 2007:226; Jarzabkowski *et al.*, 2007:9). By shifting this focus from outcomes or processes to the organisational individual in adopting the strategy as practice perspective, scholars can begin to understand the everyday activities, practices and processes as the doing of strategy that brings about strategic change for organisations (Balogun *et al.*, 2007:196). This research focus of strategising (or *strategising research*) therefore becomes important to produce explanations for activities that have consequences for the firm (Balogun *et al.*, 2007:203). Strategising is concerned with the micro doings of strategy, such as the thinking and talking of strategists (practitioners) and the interaction between strategists. It also focuses on what strategists use (such as technology and strategy tools) and what type of events they create (such as workshops or planning) in their everyday doing of strategy (Balogun, Huff & Johnson, 2003; Jarzabkowski, 2004, 2005; Whittington, 2003, 2006 in Balogun *et al.*, 2007:196).

Strategy as practice sees strategy as an activity rather than as an object, and the literature is therefore concerned with this activity in the organisational context, which essentially focuses on the interaction between people within the organisation (Johnson *et al.*, 2007:3). By focusing on individuals in the organisation and the interaction between them, there are several questions that come to mind. In particular, this effort essentially allows one to focus on what these people actually do under the concept of strategising and equally important, the influence of these interactions and activities on the strategic outcomes of the

organisation (Johnson *et al.*, 2007:3). The focus on strategising reflects the shift from the traditional strategy research perspective of something an organisation has, to something an organisation does (Johnson *et al.*, 2003:3; Whittington, 2006:613). It is therefore important to delineate the definition of *strategising* in the strategy as practice perspective to ensure consistency in the application of frameworks and paradigms:

- Floyd and Wooldridge (2000:87) describe strategising as “an organisational learning process... new strategies evolve over time, not from discrete decisions but from indeterminate managerial **behaviours** embedded in a complex social setting”,
- Johnson *et al.* (2003:3) refer here to “the detailed processes and **practices** which constitute the day-to-day activities of organisational life and which relate to strategic outcomes”,
- Jarzabkowski *et al.* (2007:8) relate strategising to the “doing of strategy”, or “the construction of this flow of **activity** through the actions and interactions of multiple actors and the practices they draw upon”,
- Maitlis and Lawrence (2003:111) refer to the concept of strategising as emphasising the “micro-level processes and **practices** involved as organisational members work to construct and enact organisational strategies, through both formal and informal means”, and
- Whittington (1996:723) defines strategising as “the meeting, the talking, the form-filling and the number-crunching by which strategy actually gets formulated and implemented”.

With an emphasis on the behaviour, activity and practices in strategising, strategy as practice also extends its focus to understanding to what Schmid *et al.* (2010) terms the “hearts and minds of strategic actors”. It examines the abilities of these individuals and the dispositions that enable them to perform strategy, and explore notions of agency and hierarchical structures in the context of those individuals who exert strategic influence on strategy processes (Schmid *et al.*, 2010:151-153). Strategy as practice advocates for the systematic investigation into various levels of management, moving the traditional focus from the upper echelons to middle managers and other influential individuals within or outside the organisation (Schmid *et al.*, 2010:151). This understanding allows for the development of models of collective or organisational competencies that illuminate characteristics, abilities and social interactions that are deemed influential in strategic change (Schmid *et al.*, 2010:151; Floyd & Lane, 2000 in Schmid *et al.*, 2010:158). The

practice perspective can also explore how roles are perceived and how network positions influence action in strategic activities (Pappas & Wooldridge, 2007 in Schmid *et al.*, 2010:150).

3.2.3 Contribution of Strategy as Practice

Johnson *et al.* (2007) distinguishes between three major reasons for strategy scholars to adopt the strategy as practice perspective and to focus on the daily doing of organisational employees in relation to the strategies that they create:

- *Economic reason*: The competitive advantage of an organisation is most likely to be entrenched in the behaviour of an organisation's employees as "micro-assets" which are difficult to trade when considering a resource-based view (Johnson *et al.*, 2007:8). Furthermore, when an organisation finds itself in a competitive environment, the innovative responses that influence strategy are most likely to come from those at the periphery (meaning the edge) of strategy (Regnér, 2003 in Johnson *et al.*, 2007:8).
- *Theoretical reason*: The resource-based view has been inadequate in the strategic management literature, as it has marginalised the activities of managers in the organisation which competes for resources. Other theories (such as the evolutionary theory) are central in the strategy debates as it considers the effect and importance of micro activities on macro effects, but the roots of these theories are very rarely studied. Institutional theories again focus on the organisation as the strategic entity, and although it acknowledges that organisational employees are responsible for creating institutions through a series of negotiations, it still lacks empirical evidence in its research (Johnson *et al.*, 2007:9).
- *Empirical reason*: The previous research on relationships within the strategy literature has been tentative at best – it cannot be assumed that these relationships are really exploited in practice, such as the case of corporate diversification (Johnson *et al.*, 2007:10). Empirical studies within the strategy literature have left contradicting findings and other studies have largely neglected the detailed activities within the larger phenomena of strategic planning, decision-making and managerial cognition (Johnson *et al.*, 2007:11).

Strategy as practice also enhances and integrates the traditional literature by contributing in four distinct ways. Firstly, it refocuses on what individuals in organisations do to manage organisational strategies by incorporating *sociological* rather than *economic* theories that have been historically the dominant focus of strategy. Secondly, it broadens the view on strategy, therefore broadening the scope of research and type of organisations that can be studied and subsequently offers exploration of various strategic outcomes. Thirdly, strategy as practice brings about an entire methodological shift that has a qualitative orientation, which allows in-depth exploration and explanations for major strategic issues and act as integrating mechanism for the broader strategic management field (Johnson *et al.*, 2007:3-4; Vaara & Whittington, 2012:290-1). Lastly, strategy as practice emerged in response to economic views of strategic planning, which depict an idealised “rational actor” myth of strategic decision making without fully attending to the complex and often convoluted day-to-day processes of decision making or decision makers (Jarzabkowski, Melin, Langley & Whittington, 2007 in Suddaby *et al.*, 2013:33).

It is argued that the true potential of strategy as practice can only be realised by offering multi-disciplinary explanations that integrate both theoretical and empirical work from a variety of related disciplines in the social sciences. Incorporating various theories and concepts allow for insight into the multidimensional facets of human behaviour by integrating various approaches (Schmid *et al.*, 2010:153). Practice scholars advocate and frequently call for multi-method approaches that have displayed insight in micro-level phenomena and combine several methodological approaches, such as psychology (Chatman & Flynn, 2005 in Schmid *et al.*, 2010:159).

3.3 A FRAMEWORK FOR STUDYING STRATEGY AS PRACTICE

As seminal author in the strategy as practice literature, Whittington (2006) identified three elements of practice theory that offer a perspective on understanding and studying strategy as practice. These interrelated elements of organisational and social *practices*, organisational activity (termed *praxis*) and actors (termed *practitioner*) form the basis for approaching strategy as practice (Whittington, 2006:615). Each of these elements comprise a different entry into studying strategy as practice and comprise of distinct analytic approaches (Jarzabkowski, 2005 in Jarzabkowski *et al.* 2007:8). Reckwitz (2002) offers

helpful explanations of these terms by distinguishing between praxis and practice through the dual sense interpretation of practice within social science. Reckwitz (2002:251) argues that practice can be defined as “something that guides activity and as activity itself”. From this perspective, practices then refer to “shared routines of behaviour, including traditions, norms and procedures for thinking, acting and using things” (Whittington, 2006:619). Whittington defines praxis then as what people do in practice: the actual activity that occurs. The practitioner in this sense, is the actor of strategy: the *strategist* who enacts the activity and utilises its practices (Whittington, 2006:619). These notions of praxis, practices and practitioners are subsequently explored.

3.3.1 Praxis

The concept of praxis has various definitions and interpretations in the strategic management literature. Some are more abstract such as Reckwitz (2002:249) who describes praxis as “an emphatic term to describe the whole of human action”, or Sztompka (1991) who compares praxis to the nexus between what people are doing and what subsequently unfolds within society (Jarzabkowski *et al.*, 2007:9), essentially making the micro and macro properties of praxis much more explicit. Seminal strategy as practice author Whittington (2006:619) describes praxis within the strategy as practice context as the “specific activities such as meetings, retreats, conversations, talk, interactions and behaviours to generate what is then conceived of as strategy” or simply put: “what people do in practice”. Jarzabkowski and Seidl (2010:12) supports this notion of activity in Whittington’s definition of praxis by focusing on activities and subsequently defining praxis as “the sheer labour of strategy, the flow of activities such as meeting, talking, calculating, form-filling and presenting through which strategy gets made”.

It is important to grasp the concept of praxis as praxis are operationalised at various levels in the strategic environment – from micro to institutional – and is a dynamic occurrence that fluidly swifts through interaction between individuals at all levels (Jarzabkowski *et al.*, 2007:9). As a good example, Jarzabkowski *et al.* (2007:9) use the example of Vaara, Kleyman and Seristo’s (2004) study of how mergers and acquisitions as praxis have diffused throughout the entire airline industry over a period of 20 years, referring to praxis as accomplishments over time (Jarzabkowski, 2009:73). But the same phenomenon can also

be studied as a praxis at the micro level, which would examine the behaviour of a particular group of individuals within the organisation (or airline, in this instance) who engaged in the activities of performing the merger for a specific airline. This study of Vaara *et al.* (2004) examined the praxis of merger and acquisition at different levels as it is socially constructed over a period of time (Jarzabkowski *et al.*, 2007:9). Jarzabkowski *et al.* (2007:9) on their turn define praxis as comprising the “interconnection between the actions of different, dispersed individuals and groups and those socially, politically, and economically embedded institutions within which individuals act and to which they contribute”.

What is pertinent from the various proposed definitions of *praxis*, is the core idea that praxis is enacted or performed by people, which - in the context of strategy as practice – can be called practitioners. The praxis in strategy, therefore, relates to the organisational work that occurs within the organisation that allows for strategy to be made and executed through various activities (Whittington, 2006:626). Praxis is often heavily diffused but can still be examined within certain episodes or sequences of strategy work (Hendry & Seidl, 2003 in Whittington, 2006:619), such as strategy workshops or frequent board meetings, or even smaller occurrences such as team briefings, presentations or by simple strategy talk (Mezias, Grinver & Guth, 2001 in Whittington, 2006:61). The occurrence of praxis is particularly wide and embraces several dimensions such as the routine or the non-routine, the informal approach or the formal approach and activities at the end of the organisation or at the core of the organisation (Regnér 2003 in Whittington, 2006:619). With its wide application, the work of praxis can bring about significant symbolic value and social functions far beyond the intent of the praxis (Langley 1989 in Whittington, 2006:619).

By focusing on practitioners, praxis also implicates interaction and interconnection between different people, different activities and different levels, which relates strongly to Sztompka’s (1991) definition of strategy praxis as described earlier. This interconnectivity can be examined on three different levels within the strategy literature:

- *Micro praxis*: Micro praxis explain strategy praxis at the individual’s experience of a certain strategic episode. This can include a strategic decision or a strategic meeting. Micro praxis studies attempt to explain the specific phenomena that is proximal to the individuals who construct strategy as part of their interactions on a micro level.

- *Meso praxis*: Studies that explore meso praxis do so at either the sub-organisational or the organisation level and usually focus on strategic episodes such as a simple strategy process or a strategic change programme.
- *Macro praxis*: Macro praxis refer to studies that explore strategy praxis at the institutionalised level, usually reflecting strategic patterns of action within the organisation's industry (Jarzabkowski & Spee, 2009:75).

3.3.2 Practices

Strategy scholars use various definitions of *practice* within the strategy as practice field due to the various theoretical and philosophical perspectives associated with broader practice theory (Jarzabkowski & Spee, 2009 in Jarzabkowski, 2011:132). What seems to be central to the definition of practice is that practices mediate between the strategic activity and its subject group and focal community (Jarzabkowski, 2011:132). Whittington (2006:619) provides a more comprehensive description of practices, stating that they are “shared routines of behaviour, including traditions, norms and procedures for thinking, acting, and using things”. In a very similar fashion, Jarzabkowski (2004:54) describes *practice* as “the actual activity, events, or work of strategy, while *practices* are those traditions, norms, rules and routines through which the work of strategy is constructed”. Reckwitz (2002:249) argues that practice has a behavioural aspect to it and describes *practices* as “routinized types of behaviour which consists of several elements, interconnected to one another: forms of bodily activities, forms of mental activities, ‘things’ and their use, a background knowledge in the form of understanding, know-how, states of emotion and motivational knowledge”. This is an important definition for practice, as it implies that practices are constructed through utilising several “background coping skills” that practitioners use in an unconscious way to act out practices in their everyday work (Chia, 2004:32). There is general consensus in strategy as practice that the term practice could have various meanings, but it is assumed that it includes things such as events, routines, rules or simply having a practical orientation to strategy (Clegg, 2012:19). But practice does not always refer to only explicit routines or concepts that produce action in strategy, it could also be embedded in strategy tools such as Porter's Five Forces or strategy's material artefacts such as PowerPoint or manual flipcharts that have seen a particularly wide institutionalisation (Jarzabkowski and Whittington 2008:101 in Jarzabkowski *et al.*, 2007:82). Practices can provide a shared

understanding of the nature of strategy and how strategy work is to be performed, or the tacit knowledge on how to understand strategic concepts and discourse and provide knowledge on habits in doing strategy such as strategic away days or strategy meetings (Jarzabkowski *et al.*, 2007:82).

Practice (and particularly strategy practices) is an essential element to the strategy as practice research agenda. With the existence of multiple concepts of practice in general practice theory as well as strategy as practice, the task has been challenging due to the interrelated and entangled nature of practices in organisational activity (Carter, Clegg & Kornberger, 2008 in Jarzabkowski *et al.*, 2007:81). Jarzabkowski *et al.* (2007:82) describe practices as complex, interrelated bundles that are not often conscious to practitioners. It thus becomes difficult to segregate or isolate a single practice from an interrelated “fabric” of practices in strategy work (Jarzabkowski *et al.*, 2007:81). Schatzki (2006:1864) therefore conceptualises the existence of this set of interrelated practices as a “bundle” of practices and relates it to the various organisational arrangements and its interconnected materiality, such as the decision-making, research and teaching within an academic department by making use of materials such as classrooms and laboratories. Schatzki, a seminal practice theorist, highlights the constitutive and active nature of practices within organisations as dynamic entities that are a means of organising, rather than objects that facilitate organising (Jarzabkowski *et al.*, 2007:82). Some scholars such as Orlikowski (2007 in Jarzabkowski *et al.*, 2007:82), argue that the material nature of practices cannot be separated from the activity of the practice, and therefore conceptualise practices as “socio-material”, in that they are part of the social nature of practices.

Despite various definitions and a clear research agenda for strategy as practice, the empirical literature of strategy as practice in particular, reveals no dominant perspective on conceptualising practices (Jarzabkowski *et al.*, 2007:82). These various approaches to understanding and studying practice through several theoretical orientations are comprehensively discussed later in this chapter (refer to Chapter 4:). The practices that one finds during the activity of strategising - as with praxis - are also multi-levelled (Klein, Tosi & Cannella, 1999:243). This means that at one level, practices might be specific to the organisation and could be embedded in the organisational routines, its standard operating procedures as well as its organisational culture (Whittington, 2006:620). On another level,

practices can be found external to the organisation, derived from the larger social systems within which the organisation is situated (Whittington, 2006:620). Practices may be derived or adapted from the sector or could be norms of appropriate strategic behaviour as set by the industry. At a higher level, practices could also be deducted from societies. These societal practices could be norms of structure that are diffused internationally, specific techniques used to legitimise strategising, or even different discourse that could legitimate the ways in which strategy is being done (Whittington, 2006:620).

3.3.3 Practitioners

The last element identified as common in practice theory by Whittington (2006:615) is the practitioner. The practitioner in the strategy as practice framework is the organisational individual (or actor) who performs the activity of strategising and who carries its associated practices (Whittington, 2006:619). Practitioners are core to the production, transfer and innovation of strategic practices (Whittington, 2006:625). The strategy as practice framework makes explicit that practices, praxis and practitioners are interrelated elements in the act of *strategising*, and practitioners are therefore a critical link between practices and praxis (Jarzabkowski *et al.*, 2007:10). Practitioners draw upon practices in order to derive agency in the organisation in order to influence and act in the context or society within which they strategise (Reckwitz, 2002; Jarzabkowski *et al.*, 2007:10). The practitioners of strategy, also called *strategists* in the strategy as practice literature, have historically been portrayed as only the top management of organisations (Johnson *et al.*, 2011:500). This intense focus on organisational executives stemmed from the general management traditions of the Harvard Business School that depicted the making of strategy as an individual, rational process. Research was historically focused on the upper echelons as “extraordinary individuals” who portrayed distinct characteristics and decision-making behaviour (Schmid *et al.*, 2010:145). However, the strategy as practice literature argues that the term *strategist* also encompasses non-executive directors, strategic planners, middle managers and strategy consultants (Johnson *et al.*, 2011:500-6) who are all directly involved in strategising. There are also those strategy practitioners with an indirect influence on strategy which include business schools and its lecturers, strategy experts and even policy makers, as they also contribute to shaping legitimate strategy practices and praxis (Jarzabkowski & Seidl, 2012; Johnson *et al.*, 2011:499).

Practitioners are critical to strategy as practice: they are the actual beings who make, shape and execute strategies (Whittington, 2006:619). Practitioners are complex entities and their actions of strategising are executed according to different social factors such as their positions within society, their belief and value systems and experiences as well as their dispositions. Based on these, they are expected to draw upon different practices when engaged in different activities related to strategising (Gomez, 2011:142). Beyond being mere humans who can be monitored and whose actions can be recorded and analysed, they are also social beings who are influenced by their personal characteristics and skill set that they use to determine the way they work and what they are ultimately able to achieve (Rouleau, 2005; Samra-Fredericks, 2005; Vaara & Whittington, 2012). Jarzabkowski *et al.* (2007:10) argue that practitioners are an obvious choice of analysis in the study of strategy as practice as they have a direct influence on organisational strategy through “*who they are, how they act, and what practices they use*”. Strategy as practice has given rise to two major areas of focus on practitioners, namely the exploration of a variety of practitioners that are identified as “strategy specialists” (Vaara & Whittington, 2012:308) and an intense focus on middle managers and their networks within the organisation (Mantere, 2005; 2008; Rouleau, 2005).

To be a strategist and to practice strategy implies having the *capacity* to enact strategy. This could include having certain designs and plans (Knights and Morgan, 1991), the ability to be self-directed and independent in strategy work (Knights & McCabe, 2003) and to master the environment in which the strategist works, together with his or her career (Allard-Poesi, 2011:169). Allard-Poesi (2011:169) argue therefore that the practice of strategy establishes the capacity for strategic choice, action and the ability to influence, to some extent, the behaviour of other organisational individuals. This argument gives rise to research directions such as the choice perspective, which is centralised around characteristics of top management teams, champions of strategy and how they are able to impact organisational strategy and performance (Schmid *et al.*, 2010:145). Traditional approaches to the choice perspective developed in parallel through both process (the rational-mechanistic perspective) and content approaches (calculated rationality allows individuals to choose profitable and successful outcomes) but, with new perspectives it has recently taken on a more complex social view of strategy making - shifting strategic choice to strategic change, a central practice perspective. With the contemporary focus on *social learning*, this direction

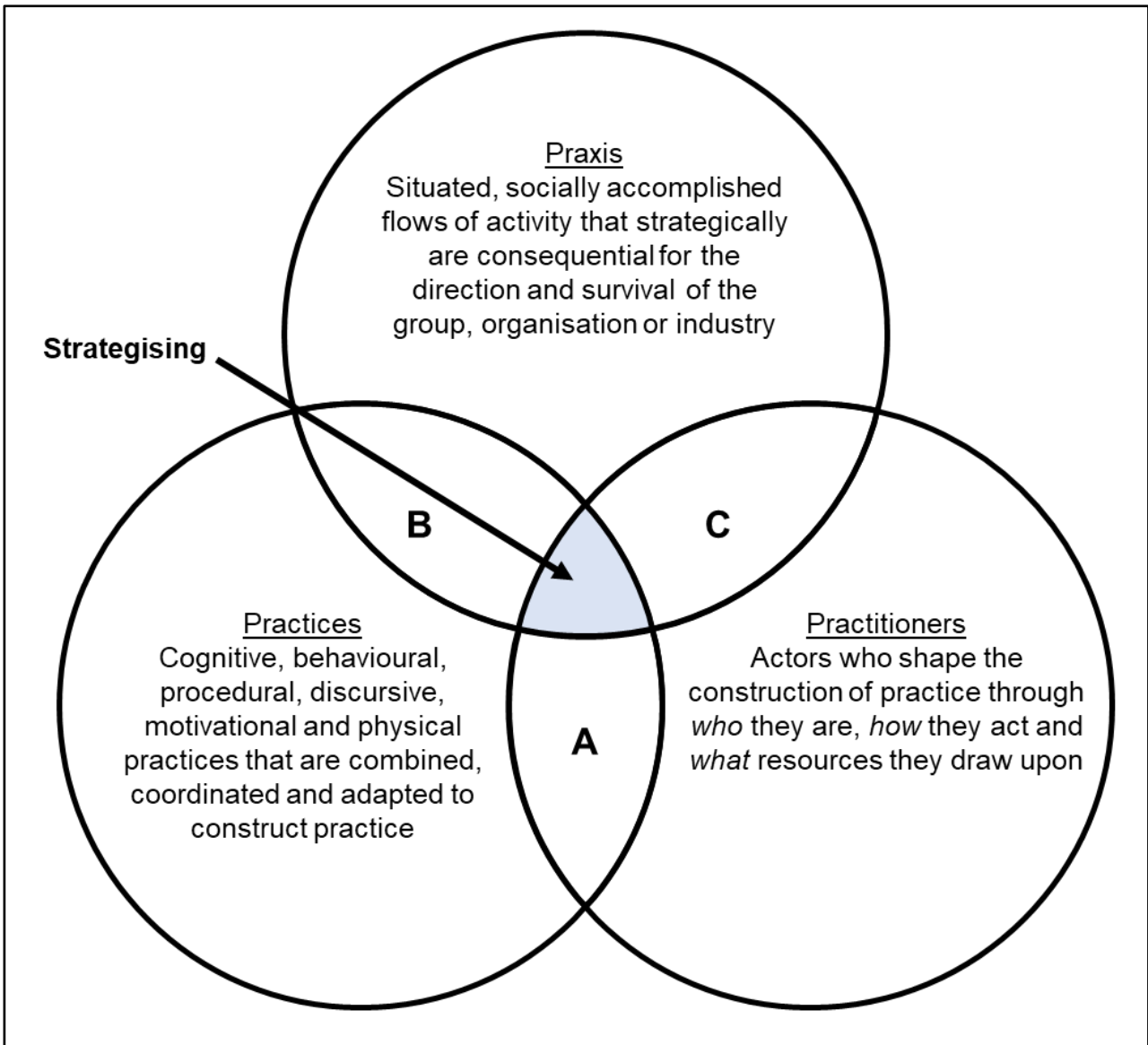
in strategy as practice considers the social learning processes in organisations as individuals discover how to adapt to dynamic environments (Schmid *et al.*, 2010:146). It is amid this perspective where middle managers become an important research subject due to their influence on social learning, and subsequently the development of organisational strategy (Wooldridge *et al.*, 2008 in Schmid *et al.*, 2010:146).

Understanding the strategist, whether an organisational or extra-organisational practitioner is key in advancing the strategy as practice domain. Blacker (1995) argues that *who* a person is, is intricately connected with the way that person will behave and how the consequences of this behaviour will influence how activity is constructed (Balogun *et al.*, 2007:202). Beech and Johnson (2005) conducted such a study to show how a strategist's identity – and the identity that he or she has imposed on him or her by others – impact how they strategise (Balogun *et al.*, 2007:202). In a similar fashion, Rouleau (2005) showed how a strategist's gender could dictate what a strategist does. These attempts to gain insight into gender and identity shape an avenue of research in strategy as practice that analyses the strategist in terms of the skills and abilities the strategist brings to its role in constructing strategy (Balogun *et al.*, 2007:202).

3.3.4 The nexus between praxis, practices and practitioners

Although most studies follow what Giddens (1979) terms methodological bracketing, the practice theory provides for the exploration of the aforementioned framework through the assumption of interconnectedness. It is therefore possible to study the core elements of strategy as practice according to its objective, but to acknowledge the three elements that constitute the strategy as practice perspective as an integrated whole (Whittington, 2006:620). Jarzabkowski *et al.* (2007:11) provide a meaningful and practical framework not only to understand the strategy as practice domain, but also to underpin the key research questions within the research agenda for strategy as practice. It illustrates the elements of strategy as practice as interconnected but discrete elements, which allows for drawing from one whilst studying the other (Jarzabkowski *et al.*, 2007:10). This framework is displayed below in Figure 3.2.

Figure 3.2: A framework for studying strategy as practice

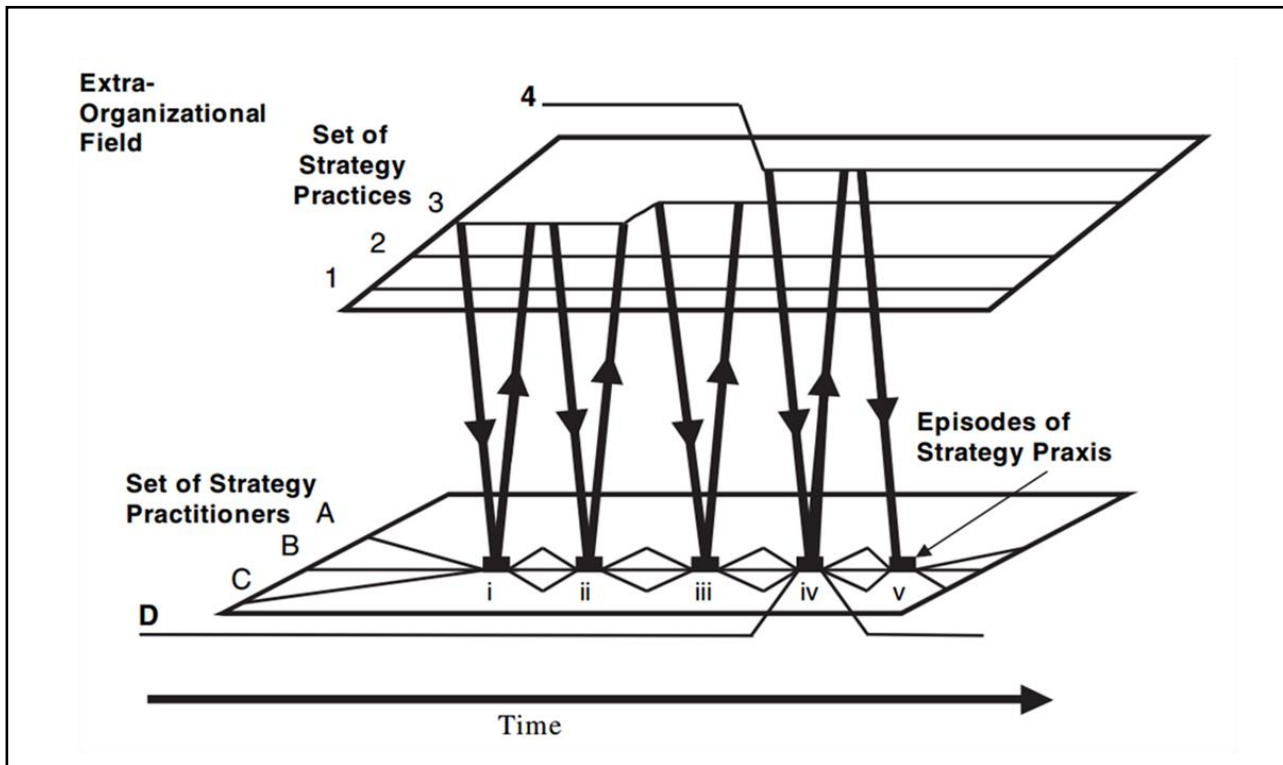


Source: Jarzabkowski *et al.* (2007:11).

Whittington (2006) provides another useful framework to illustrate strategy as practice as an integrated perspective. He joins the elements of praxis, practices and practitioners within an integrative framework for strategy as practice to illustrate their practical interconnectedness. Following his argument from practice theory, practitioners are seen as the critical connection between the intra-organisational praxis and the organisational and extra-organisational practices that practitioners rely on, in this display of praxis. Moreover, following Giddens's (1984; 1991) characterisation of the contemporary world as marked by open social systems, plural practices and reflexive actors, practitioners also have the possibility of changing the "ingredients" of their praxis. By reflecting on experience, practitioners are able to adapt

existing practices; by exploiting plurality, they are sometimes able to synthesize new practices; by taking advantage of openness, they may be able to introduce new practitioners and new practices altogether (Whittington, 2006:620).

Figure 3.3: Integrating praxis, practices and practitioners



Source: Whittington (2006:621).

It must be realised that within the strategy as practice framework, practitioners are a critical, active connection. This connection is not passive: they rather actively draw from practices to create what Whittington calls “artful praxis” (2006:620). This process, depicted in Figure 3.3 below, illustrates a series (or episodes) of praxis that occur within an organisation over time. On the upper bar of the visual, a legitimised set of organisational strategy practices (1, 2 and 3) are portrayed. These would include organisational practices such as simple discourse and routines. Practitioners will then draw upon these institutionalised practices in order to conduct an episode of strategy praxis, illustrated in the lower bar as praxis i, ii, iii, iv and v. Although strategy practitioners (A, B and C) draw upon these practices in a static manner, they could amend the practices before they are drawn upon for a future episode of strategy praxis (see 3). However, praxis could also be influenced by both external practices (4) and the external practitioner (D). See episode iv where an external practitioner (D) draws

upon a practice from outside of the organisation (4). The inclusion of this external practice by an external practitioner could potentially be legitimised by organisational practitioners, and subsequently utilised for a future episode (see v) of strategy praxis. Internal strategy practitioners (A, B and C) have now institutionalised an external practice (4) introduced by an external strategy practitioner (D) and have adapted and adopted the practice for future episodes' praxis (Whittington, 2006:620-621).

This chapter systematically introduced the strategy as practice perspective in strategic management, by encompassing the broader theoretical movement towards understanding the nature of social practices and its influence on strategy, and its perspectives thereof. It provided the theoretical motivation for the prominent development and importance of the strategy as practice perspective before introducing several theoretical underpinnings of the strategy as practice approach that are profound in the current strategy as practice research. The chapter concluded by firstly providing insight into how the strategy as practice research agenda is structured and pursued before providing a comprehensive summary of recent research conducted within the strategy as practice domain, as presented by the international online community of strategy as practice scholars. The next chapter introduces the most important of several theoretical perspectives of strategy as practice, as they are used within the strategy as practice literature.

CHAPTER 4: THEORETICAL PERSPECTIVES OF STRATEGY AS PRACTICE

Chapter 3: introduced the strategy as practice perspective in strategic management and its origin, fundamental theoretical underpinnings and its influence on the current strategy as practice research. This chapter is theoretically oriented, and sets out to introduce the main practice and practice-based theories that may serve as potential explanation of the grounded theory categories that are introduced later in this thesis. It does not necessarily serve to provide theoretical argument about strategy as practice perspectives, but rather lays the theoretical foundation that are fundamental for understanding how the findings are ultimately analysed and integrated into the existing strategy as practice literature. The chapter concludes by firstly providing insight into how the strategy as practice research agenda is structured and pursued before providing a comprehensive summary of recent research conducted within the strategy as practice domain (see Appendix D), as presented by the international online community of strategy as practice scholars.

4.1 INTRODUCTION

Kurt Lewin states the purpose of strategy as practice effectively in stating “Nothing is so practical as a good theory” (Golsorkhi *et al.*, 2011:9). A good, practical theory allows us to deepen our knowledge about a particular phenomenon without requiring major efforts. However, within strategy as practice, there is no particular theory of practice that can answer all research questions simultaneously, as the levels of analysis in strategy as practice differ: from reflections on the literature to idiosyncrasies of diverse strategies in different contexts (Golsorkhi *et al.*, 2011:9).

There are various theoretical models and resources that can be borrowed from other disciplines for the perspective that strategy as practice adopts. This adoption is already an integral part of the broader practice turn in contemporary sociology and should incorporate robust theoretical models that can guide researchers in pursuing their new theoretical directions. It has already found its way through various studies: from middle-range theorising to empirical work, studies of learning and even research into science and technology (Balogun *et al.*, 2007:204; Johnson *et al.*, 2007:30). The broader practice approach entails

a multiplicity of theories that share commonalities for application in strategy as practice (Reckwitz, 2002; Schatzki *et al.*, 2001). The practice research agenda allows room for various existing organisation and social theory approaches (Balogun *et al.*, 2007:204). Furthermore, many of the current problems in the strategy literature can be illuminated by adopting practice-based perspectives (Jarzabkowski, 2005; Antonacopoulou & Ferdinand, 2004; Hodgkinson & Clarke, 2004 in Balogun *et al.*, 2007:204). Such previous studies have already drawn upon concepts such as sensemaking, cognition, discourse and power in the broader practice theory (Balogun *et al.*, 2007:204).

Among others, Golsorkhi *et al.* (2011) sets out to illustrate how various sociological theories from seminal authors can be applied to strategy as practice. A few of these theoretical orientations and their practical implications for the strategy as practice perspective are subsequently discussed after the general introduction of practice theory.

4.2 PRACTICE THEORY

Perhaps the most important understanding in strategy as practice should be the theoretical concept of practice, or at least *practice theory*⁴. In making sense of the world, social scholars have for long labelled the primary social things of our being as “actions” and “events” or even “structures” or “systems”. Today, practices could be awarded the same honour in the identification of the “primary generic social thing”. Many academic fields have started to incorporate references to practices, from sociology to philosophy through to science and technology studies (Schatzki, 2001:10). This broad notion of incorporating practice into academic disciplines (referred to as the practice turn) are due to movements in these disciplines (such as strategic management) beyond its current way of thinking, and advancing arguments beyond the existing problematic dualisms that plague these disciplines (Schatzki, 2001:10). Part of this practice turn in contemporary thinking are philosophers such as Wittgenstein (1958) and Taylor (1985 in Schatzki, 2001:10), who argue that both subject and object is underlined by practice.

⁴ Alternative labels include “practice idiom, praxeology, practice lens and practice-based studies” (Nicolini, 2017:19).

Sociologists among the likes of Bourdieu (1977, 1990) and Giddens (1979, 1984), have also sought to adopt practice theory to “free” activity from the clutch of being constrained by objectified social systems and social structures and to examine the role of the individual and its action(s) as primary things in social phenomena (Schatzki, 2001:10). Even cultural theorists such as Lyotard (1984, 1988) and the prominent Foucault (1976, 1980) see language as a discursive activity and therefore as a practice, which aids in understanding language amid structuralist or semiotic conceptions (Schatzki, 2001:10). Regardless of discipline or subject, practice theorists have made valuable contributions to the understanding of complex issues in the social sciences. By opposing the most recent ways of thinking (such as individualism, structuralism and humanism), scholars have made significant philosophical and social scientific contributions to human activity such as subjectivity, language, the organisation and social life (Schatzki, 2001:10).

Central to practice theory lies the concept of practice(s). There are many definitions or understandings of practice (Nicolini, 2017:21). Schatzki (2002) puts forward a widely accepted definition or view of practice by defining practices as “open and spatially, temporally dispersed sets of doings and sayings organised by common understandings, teleology (ends and tasks) and rules” (Nicolini, 2017:21). Nicolini (2017) defines practices a bit more simplistically yet abstract, defining practices as “regimes of a mediated object-oriented performance of organised sets of sayings and doings”. Schatzki (2001:11) argues that practice theorists think in terms of activity: an activity that belongs to a human, and when performed in an array, constitute a practice. Some practice theorists argue that these activities are underpinned by tacit knowledge, several assumptions and certain skills, which in turn can be defined as practice itself (Turner, 1994; Dreyfus, 1991 in Schatzki, 2001:11). Though various definitions of practice exist among practice theorists, Feldman and Orlikowski (2011:1241) argue that practice theorists in general subscribe to three fundamental theoretical notions that are not necessarily theoretical pillars, but implicate each other:

- Practice theory sees situated actions as consequential in producing social life,
- Practice theory rejects dualism in theorising, and
- Practice theory sees relations as mutually constitutive.

In essence, practice theory describes our world and its features as something that is routinely and repetitively made in and through practice (Nicolini, 2017:20). It focuses on the everyday activity that constitutes practice, but is more concerned with providing explanations for how activity is generated and how it operates within context (Feldman & Orlikowski, 2011:1241). Practice theory also incorporates the perspective that various tools, discourse and human bodies are used in producing and reproducing practices. Nicolini (2017:21) refers here to the role of discursive and material resources in enacting practices, shortly understood as “what we say, how we say it, and when we say it”. These “material resources” Nicolini refers to could include elements of nature, organisms or artefacts through which practices are entangled and through which they transpire. Most practice theorists agree that practices are mediated by materials (including artefacts and natural objects), but the extent to which these entities are relevant is a continuous debate in the practice theory literature (Nicolini, 2017:21).

Practice theory also illustrates how activities are interrelated within ordered structures of these material resources, in accordance with wider materialist approaches. Furthermore, practice theory acknowledges that activities are dependent on skills that are shared and based upon common understanding. Therefore, practice theory propagates a unique social ontology in social theory through how the social field can be embodied by intertwined practices that are situated within shared practical understanding (Schatzki, 2001:12). Nicolini also argues that practices are organised in different ways – the way our actions and discourse are constructed together to deliver a practice, determines the extent to which the practice will differ from another practice (2017:20-21).

The use of practice theory can enhance our understanding of practice in three distinct ways (Orlikowski, 2010 in Feldman & Orlikowski, 2011:1240). Firstly, by adopting an empirical focus, the importance of practices in the everyday life of organisations can be recognised. Therefore, one can examine the central role of an individual’s actions and how these influence organisational outcomes. Secondly, adopting a theoretical focus allows examining and analysing the relations between actions of individuals and the structure of organisational life by explicitly recognising the apparatus of practice theory (Feldman & Orlikowski, 2011:1240). Thirdly, a philosophical focus adopts a view that exhibits social reality as

constituting of practices that are brought about by humans through activity, rather than a social reality that is constructed external to humans (Feldman & Orlikowski, 2011:1241).

4.2.1 Core components of practice theory

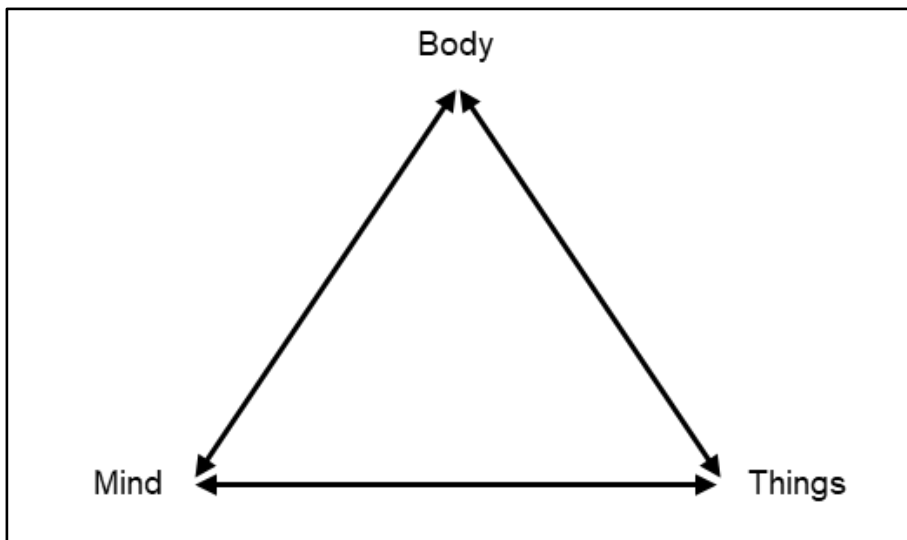
Reckwitz (2002) identified seven core concepts of practice theory, which will provide some structure for analytical discussion during this chapter. These are *body*, *mind*, *things*, *knowledge*, *discourse/language*, *structures/processes* and *agent/individual*. Within practice theory (and following Reckwitz's definition of practice), the body is conceptualised as the site of where the social happening or activity is enacted. Other fields and theories focus on this conceptualisation of the body as something that is continuously influenced and even controlled by certain external phenomena (such as values or choices). However, within practice theory this notion of body represents the "routinised bodily performances" (Reckwitz, 2002:251) that are results of training the individual body to behave in particular ways. Focusing on the trained body, practices can then be defined as "regular, skilful performance of human bodies" (Reckwitz, 2002:251).

Practices are commonly found in everyday work, such as an individual's writing, reading and/or talking or using a tennis racket to serve a ball in a game of tennis (Ritzer & Stepnisky, 2014:527). Not only does practice focus on the routines of these bodily performances, but also incorporates the routinised performance of the individual mind through mental activities. Reckwitz (2002:251) argues that an individual uses the body and mind in order to engage in practice through "certain routinised ways of understanding the world, of desiring something, of knowing something". Ritzer and Stepnisky (2002:528) explain that these routinised mental activities (similar to the routinised bodily activities) mean that the individual is not necessarily conscious in thinking through what both mind or the body will or should do, but that individuals just act in a particular routinised manner. Most practices require interaction between both the routinised mental activities and bodily activities, such as playing a game of tennis.

The next concept is that of things or objects, which becomes integral to performing a practice. Practice – by its mere definition – involves the use of certain objects in a skilful way. As illustration via the previous example of a game of tennis, the individual will not be

able to perform a game of tennis without the use of a *tennis racket*, through which the individual uses both routinised bodily movement and mental activities (such as applying the rules of the tennis game and pursuing the aims of the tennis game) to interact with the thing or object. It is primarily through the interaction of these three concepts of body, mind and things that most practice exists (Ritzer & Stepnisky, 2014:528), as illustrated below in Figure 4.1.

Figure 4.1: Basic concepts constituting practice



Source: Own illustration adapted from Reckwitz (2002) and Ritzer and Stepnisky (2014:528)

The next concept that constitutes practice according to Reckwitz’s (2002) definition of practice is knowledge. The concept of knowledge is not necessarily only about *knowing* of a subject or thematic area, but also includes the way in which the individual will understand something or know how something is to be done. All of this particular knowledge is mostly tacit or implicit and are also “ways of wanting and of feeling that are linked to each other within a practice” (Reckwitz, 2002:253). Within most practices, knowledge is routinely employed without the individual having to think about all the detailed issues that could be involved in performing the practice. Relating knowledge to Ritzer and Stepnisky’s (2014:528) example of tennis, the individual knows how to do certain things such as hitting a certain shot, as well as the aim of the specific shot (to return the ball according to the rules of the game), or perhaps the entire game (i.e. that the aim is to win) and is even knowledgeable about the emotional involvement (alertness or determination) in order to win the tennis game, but in most of the cases the individual will employ this knowledge without particularly thinking about all of the issues of knowledge that substitute the specific practice.

Next, particularly conceived as practice in itself, the discourse or language used during the performance of a practice relates to the “strings of signs” that give meaning to the behaviour or patterns of behaviour. Within practice theory, language is conceived as “bodily patterns, routinised mental activities – forms of understanding, know-how (grammar and pragmatic rules of use) and motivation – and above all, objects (from sounds to computers) that are linked to each other” (Reckwitz, 2002:254-255). The following concept in Reckwitz’s (2002) definition of a practice is the concept of structures or processes. These conceptualised structures are not to be mistaken for the more explicit structures such as organisational hierarchy, but they are embodied through routines of action such as bodily or mental routinised activities. This social structure in the routinised nature of what constitutes practice, is core to the performance of social structures. They may range from larger structures such as corporations to micro or intimate social structures such as social relations. These structures in practice are not external to the individual, nor do they exist in the mind of the individual or are they present in broader social phenomena, but they only exist within the routinised behaviour or action that constitutes practice (Ritzer & Stepnisky, 2014:528).

Lastly, this definition of practice from Reckwitz (2002) leads to a different and distinct view of the individual as agent in the performance of practice. There are many theories that focus specifically on the individual as either self-interested (such as the rational choice theory) or as being influenced by societal roles and norms (such as structural functionalism). However, since the focus of practice theory is on the practice as unit of analysis and not specifically on the individual, the individual or agent is rather conceptualised as a body-mind combination that establishes itself and its social world through the performance of specific social practices (Ritzer & Stepnisky, 2014:529). This renders the individual as agent that, according to Reckwitz (2002:256) “understands the world and herself, who uses know-how and motivational knowledge, according to the particular practice”.

4.3 GIDDENSIAN STRUCTURATION THEORY

A major theoretical orientation in strategy as practice involves structuration theory as developed by the practice theorist Giddens (1984). In an attempt to understand human activity, Giddens developed the notion of structure and agency, which has importance for

the strategy as practice field (Whittington, 2011:109). Giddens argues that individuals, through enacting a series of activities, form part of larger social systems that are constantly reproduced and exist at various levels (Whittington, 2011:110). Those participating in various social systems are argued to have agency which allows them to do otherwise, or perhaps to prioritise some systems of practice over others. Giddens also insists that individuals possess “practical consciousness”, in that they are able to articulate their motives and adapt their practices to achieve specific purposes (Whittington, 2011:111). Giddens’ structuration theory proves useful to strategy as practice scholars when studying larger social structures or institutions in which strategy is embedded (Whittington, 2011:109). Structuration theory has been used in a few general organisation studies such as Heracleous and Barrett (2001) in their study of communicative actions and deep structures during information technology implementation, Feldman (2004) in understanding resources through studying social practices in a student housing department of a university, Jarzabkowski (2008) in identifying types of strategising behaviour, Mantere (2008) in examining middle managers’ expectations of strategy and Paroutis and Pettigrew (2007) in analysing the activities of strategy teams (Whittington, 2011:119).

4.4 ACTIVITY THEORY

Activity theory, as originally pioneered by Vygotsky (1978) and developed by Leontiev (1978 in Golsorkhi *et al.*, 2011:9), remains largely under-researched and is therefore a theoretical approach that adapts a more intuitive way of conceptualising activity in order to explain the severe complexity of everyday life (Kaptelinin & Nardi, 2012:11). Activity can be simply understood as “a relationship between the subject (that is, an actor) and the object (that is, an entity objectively existing in the world)”. This relationship is characterised by the subject which has needs and wishes to satisfy these needs by interacting with the object – keeping in mind that the subject and object mutually determine each other. Therefore, activities are seen to have generative forces which have the ability to transform both the subject as well as the object. Subjects are therefore products of the activities they use to express themselves (Kaptelinin & Nardi, 2012:12).

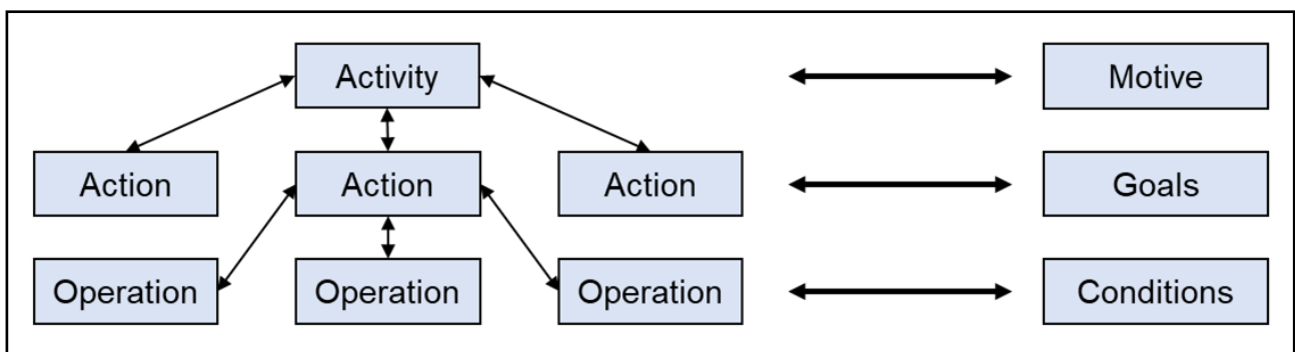
Prominent Russian psychologists such as Vygotsky (1978) and Rubinshtein (1946) pioneered the sociocultural perspective of Russian psychology in an attempt to overcome a

major theoretical divide between the human mind and larger phenomena of culture and society during the early 1900s. Their sociocultural perspectives which eventually gave rise to the development and theoretical refinement of activity theory by Leontiev contributed in two major theoretical ways: Vygotsky (1978) reinforced the notion of the social nature of the human mind whilst Rubinshtein (1946) proposed the inseparability of human mind and activity whereby activity and experience mutually determine each other. Another key element that shaped the evolution of activity theory relates to Vygotsky's argument that human beings have (in comparison to normal psychological functions) *higher psychological functions*, which are developed as a result of how humans restructure their normal psychological functions according to the cultural environment in which they develop. Here, Vygotsky argued that human beings use technologies, tools, or instruments (called artefacts) to indirectly interact with the world, conceptualised as either *psychological tools* such as a blueprint (affecting the human or others) or *technical tools* (affecting things) such as a hammer (Kaptelinin & Nardi, 2012:13-15). The concept of tools becomes a prominent feature in the remainder of this study, specifically with the theoretical analysis of the empirical findings and their relation to each other within broader practice theories. Tools allow individuals to appropriate social acting within their daily activities. The concept of tools can be understood as a metaphor for all the accumulated experiences of others contained in a structural dimension (such as a tool's material or shape), together with the knowledge required for an individual to be able to use that specific tool. Thus, in using tools, individuals are able to both accumulate as well as transmit knowledge that might be social or cultural. Use of these tools is embodied by the observable behaviour of the individual (through a process called internalisation), and these tools also influence how individuals function mentally (Kaptelinin & Nardi, 2012:15). Although many theoretical influences with different perspectives emerged from these sociocultural perspectives centred around society, experience and the role of technologies, Leontiev continued to develop activity theory as a conceptual framework which remained both consistent and distinct (Kaptelinin & Nardi, 2012:13-14).

Before activity as a unit of analysis can take any meaningful application, it is important to understand the structure of human activity. Kaptelinin and Nardi (2012) explain how activity can occur over different levels. In essence, activity occurs over the three hierarchical levels of activity, action and operations, whereby activity has a special status that reflects the

motive of the subject in attaining the object itself. The higher on the hierarchy of activity, the larger scale the unit of subject-object interaction is located. Activity theory therefore accounts for the various levels of activity within the social world, as illustrated within the hierarchical structure of activity presented below in Figure 4.2. At the highest level, activities are conceptualised to have motive, therefore an activity is oriented towards the object, which embodies the motive of the subject. An activity is composed of a specific order of smaller steps called actions but might not be immediately related to the motive. These actions are typically directed towards goals, which are always conscious, i.e. the individual will know exactly what the goal of the action is. Actions furthermore consist of several operations, which are typically unconscious and caused by the conditions within which the activity takes place. They are also conceived as actions that are unconsciously adjusted to the situation within which the subject or individual is trying to achieve a goal (Kaptelinin & Nardi, 2012:26-28).

Figure 4.2: The hierarchical structure of activity



Source: Adapted from Kaptelinin and Nardi (2012:28)

Based on the theory and discussions above, Leontiev’s (1978) activity theory constitutes some basic theoretical principles that are important for subsequent application:

- The object-orientedness of activity theory means that all human activity is in some sense oriented towards the object and is performed differently according to how the object motivates and directs these activities.
- Activity is organised into the hierarchical layers of activity, action and operation, which together may provide insight into the “why,” “what” and “how” of human activity.
- Mediation becomes a primary explanation for how human activities are distinct from non-human activities, specifically with Leontiev’s focus on tool mediation and how they appropriate specific forms of social action.

- The distribution and redistribution of activity along the internal-external dimension, which explains how activity over time can be either internalised (such as external counting on fingers which becomes an internal mental activity) or externalised through the use of tools (an internal creative idea may be embodied through the drawing of a sketch).
- Activity should always be understood in the way that it transforms or evolves over time (Kaptelinin & Nardi, 2012:29-33).

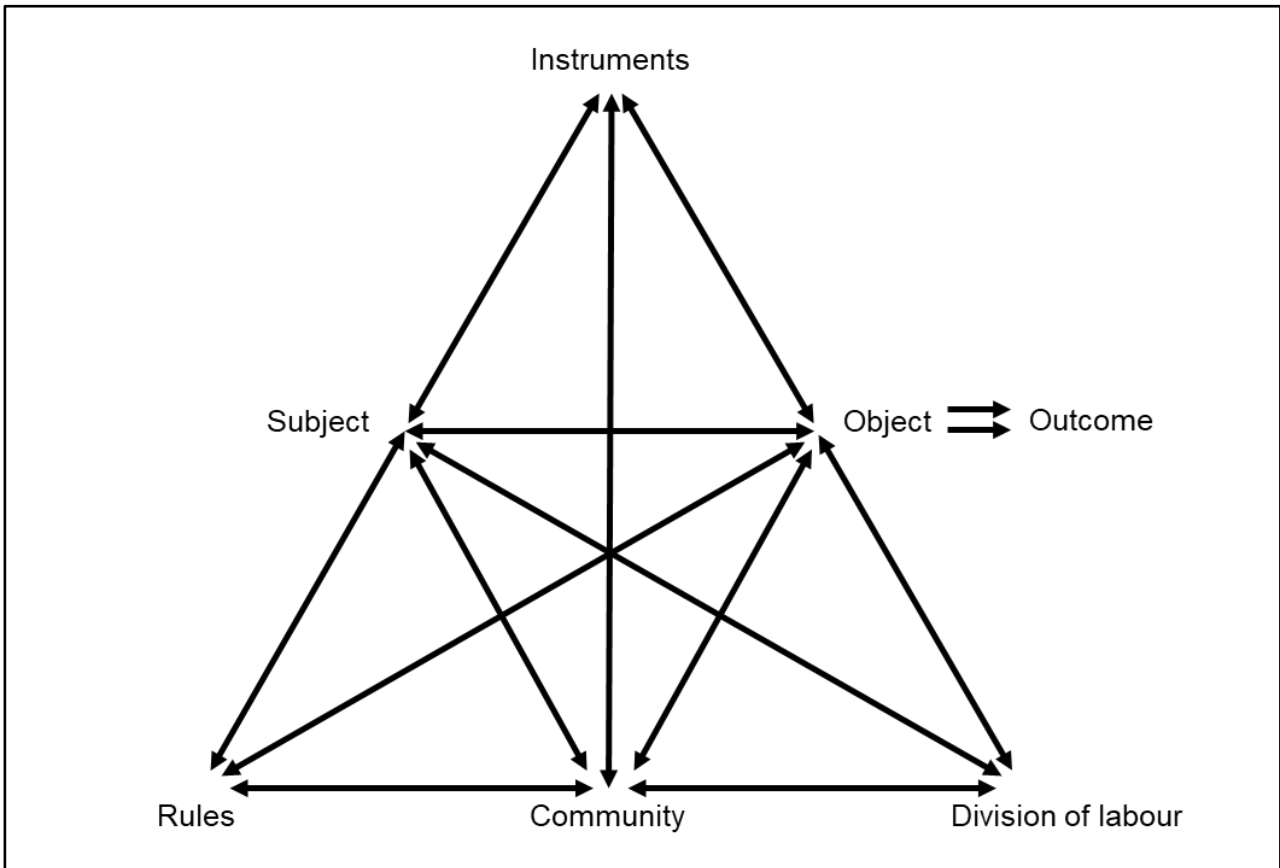
4.5 THE ACTIVITY SYSTEM

Engeström (1987) extended the original proposed individual activity system by Leontiev (1978) by focusing on activity as a product of the collective, rather than activity by the individual. Engeström argues this extension over two steps: the inclusion of the *community of significant others* or in short, the *community*, as well as inclusion of mediated interactions between the subject and object, the subject and the community and the object and the community. Engeström (1978) extended Leontiev's original activity framework by incorporating three additional components into an analytically sharpened framework of an activity system (see Figure 4.3 below): introducing the element of *tools* (mediating subject-object interaction), *rules* (mediating subject-community interaction) and lastly the *division of labour* (mediating community-object interaction). Engeström's extension of Leontiev's original activity theory (see paragraph 4.4) was based on the argument that an isolation of the individual in the activity system neglects the social distributed aspects of activity and activity systems, as well as ignoring the cultural-historical or tool-mediated influence on human behaviour (1999:22). Engeström's version of activity theory therefore fits comfortably with the strategy as practice perspective, as it foregrounds the importance of the strategist in producing strategic activity, which occurs within the strategist's social world. Engeström's activity theory provides a meaningful bridging framework between micro processes and macro outcomes, especially in understanding activity within the social collective:

- It emphasises practices as it focuses on purposeful activity in explaining organisational change,
- Its relation to institutional theory in the way that it aims to bridge individuals and organisations or their subsections through practice in the broader context,
- A particularly strong emphasis on artefacts in mediating activity, and

- The role of language in mediating activity, essentially in the way plans turn into practices through the use of language (Blackler, 2009:30-33).

Figure 4.3: The Activity System

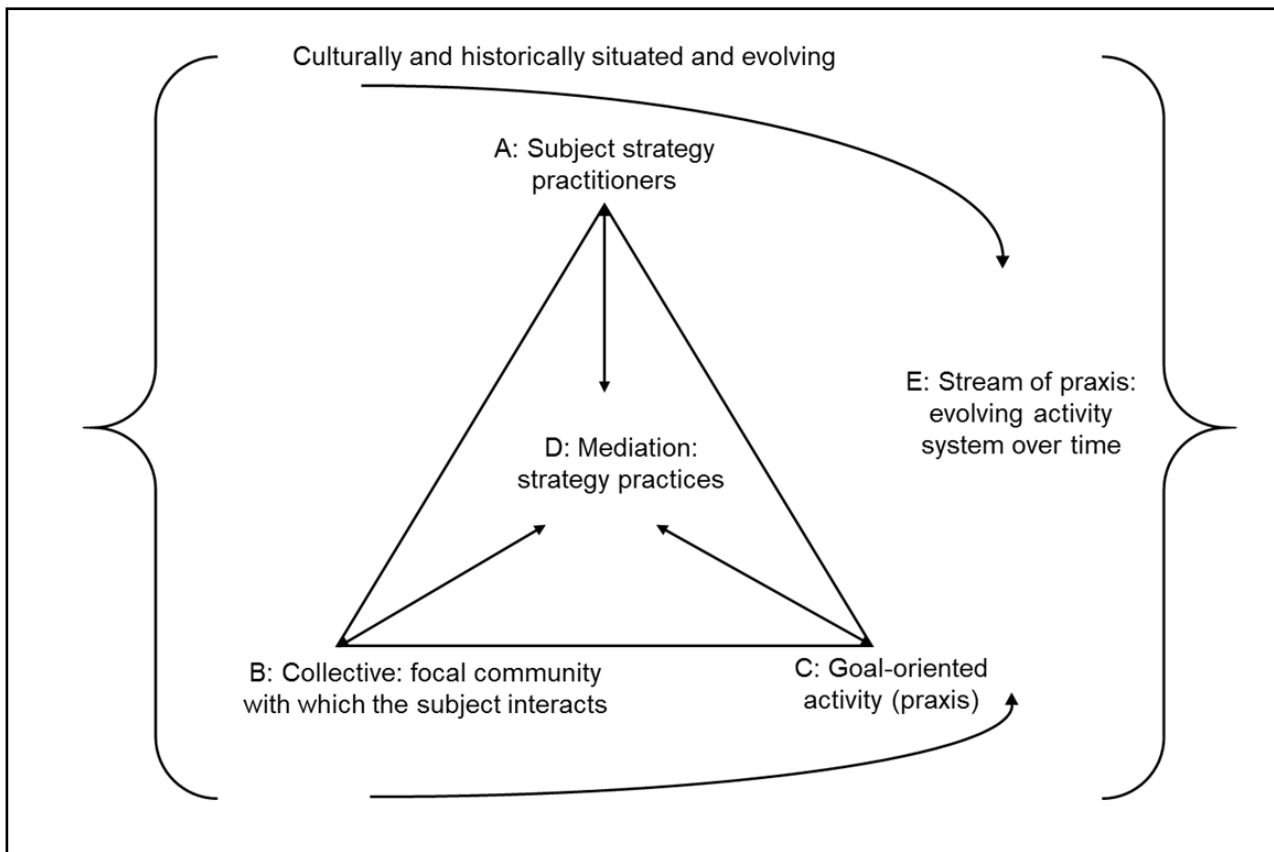


Source: Engeström (1987:78)

4.5.1 Activity theory in studying strategy as practice

Jarzabkowski (2011) sets out to explain how an activity-theory approach to strategy as practice can enhance our understanding of the interaction between the strategist and its community in the pursuit of activity (Jarzabkowski, 2011:127). Activity theory aims to explain how individuals may interact with others through collective activity as part of a community through tools that they may draw upon to mediate this interaction (Jarzabkowski, 2011:128). Jarzabkowski offers a helpful explanation of activity theory in strategy as practice by explicitly linking the activity system with the core strategy as practice framework of practitioners, practices and praxis, presented below in Figure 4.4 (Golsorkhi *et al.*, 2011:9).

Figure 4.4: An activity framework for studying strategy as practice questions



Source: Jarzabkowski (2011:130).

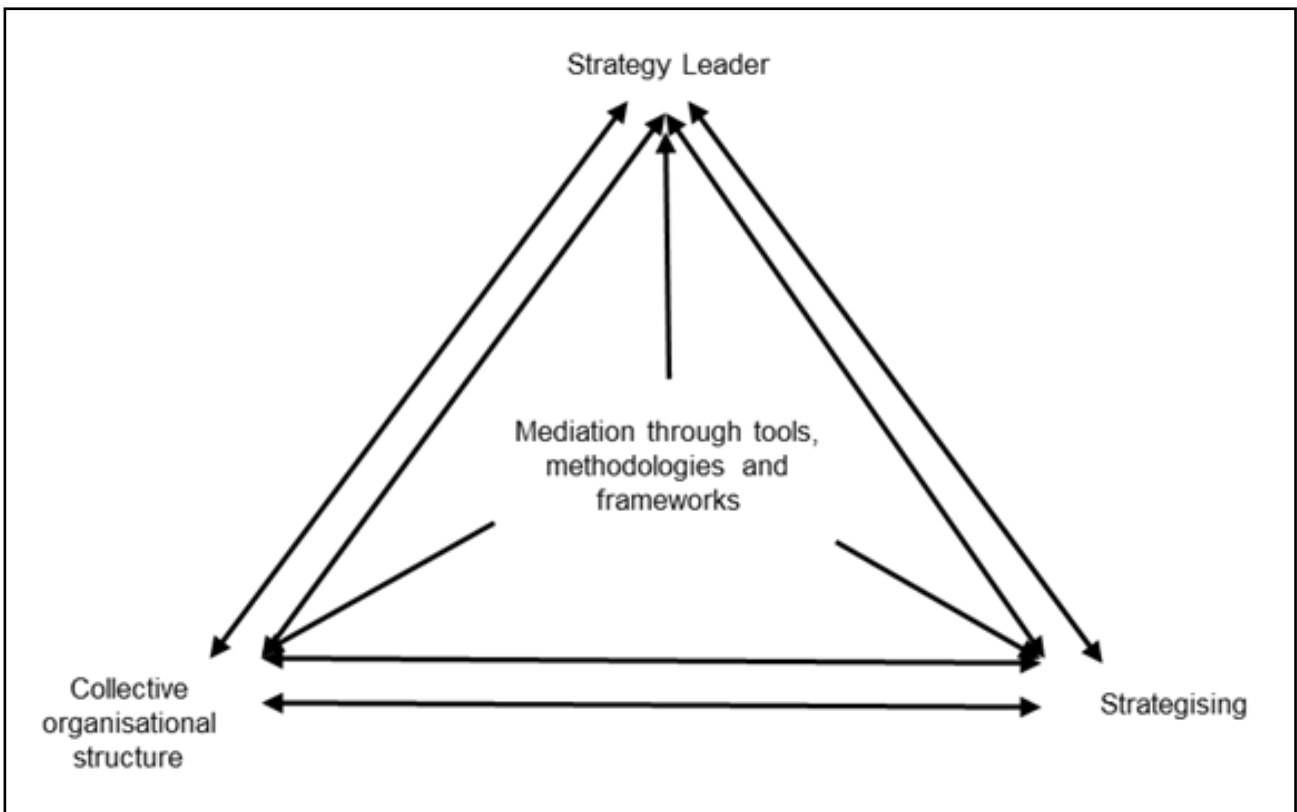
Activity theory is able to contribute to strategy as practice by enabling researchers to study practitioners and their activities in the context of a larger social group, incorporating intention into these studied actions, and provide an ontological perspective that enhances the social analysis of practitioners and their actions (Jarzabkowski, 2011:131-132). In particular, it provides a helpful explanation of the mediating relationship between practitioners and tools, in that tools “mediate between people and the world” (Kaptelinin & Nardi, 2006:10). Omicini and Ossowski (in Jarzabkowski, 2011:133) argue that these tools may present themselves through social, cognitive and even physical forms and are shaped through various mechanisms such as operating procedures, scripts, languages or routines.

Adopting an activity theory perspective fits strategy as practice particularly well, as Jarzabkowski (2011:130) illustrates how tools and methodologies mediate activity between strategists and their communities. As an empirical application of activity theory - in exploring the way in which senior executives engage with various strategy tools and methodologies in developing competitive strategy - Jarrat and Stiles (2010) use an activity theory framework

to capture insights into the strategising process. Jarrat and Stiles argue that activity theory allows scholars to investigate how strategising is framing, and being framed by the perceptions, views and cognitive models of executives within the organisational setting. In adopting this practice perspective, they are able to understand the contribution of these methodologies in context through studying variation (Jarrat & Stiles, 2010:29). Their findings substantiated the argument that no strategic model can provide “pure” strategic solutions within practice, but rather, tools and methodologies are adapted to fit their context (Jarrat & Stiles, 2010:30). Their adapted activity framework is displayed below in Figure 5.3.

In adopting the activity theory framework from Vygotsky (1978) and Leontiev (1978), Jarrat and Stiles generated three activity frameworks that explain the role of strategy in the strategising episodes of senior management, namely routinised practice, reflective practice and imposed practice. They illustrated how different managers’ perspectives on strategy, their understanding of the organisational environment and their confidence in certain strategy tools generated knowledge that was relevant for their specific operational context (Jarratt & Stiles, 2010:37). However, they were also able to illustrate that the use of traditional strategy tools was often viewed as a helpful framework for the collecting and examining of strategic knowledge, and that senior leaders often engage with multiple methodologies during strategising (Jarratt & Stiles, 2010:40).

Figure 4.5: An activity theory framework for strategy tool use



Source: Jarratt and Stiles (2010:31)

4.6 BOURDIEU

Another highly beneficial theoretical contribution to strategy as practice can be found through the application of a Bourdieusian perspective on strategy as practice, as illustrated by Gomez (2011). As an influential scholar in the social sciences, Bourdieu's perspective on strategising allows for an understanding between the concepts of *field*, *capital*, *habitus* and *practice* in a system that ultimately constitutes strategy (Gomez, 2011:141). Bourdieu's perspective can be adopted to advance understanding in the strategy as practice field through adopting a fresh perspective of practice in Bourdieu's "relational and dispositional concept of social life", to overcome dichotomies that constrain our understanding of strategy (micro versus macro strategy, agency versus structure and rationality versus emerging strategy), by broadening our scope of inquiry over a wide spectrum of activities, inclusion of internal and external organisational individuals and to illuminate the struggles inherent to strategising (Gomez, 2011:144-148). Bourdieu's perspective has been used by several leading authors in the strategy as practice domain such as Chia and MacKay (2007) in

articulating the position of the strategy as practice domain, Brown and Duguid (2001) in identifying epistemic differences between communities of practice and by Nicolini, Gherardi and Yanow (2003) who studied the relation between practice and knowledge (Gomez, 2011:141). Bourdieu's concepts of *habitus*, *capital* and *field* are widely adopted to connect practices of individuals with the concept of *knowing*. Although several elaborate theoretical perspectives with different epistemologies exist around Bourdieu's theory of practice, it is important to understand the basic theoretical assumptions and underpinnings that constitute habitus, capital and field. Bourdieu theorises practice as activity conducted by the human individual which takes place in social contexts, which on its turn gives certain meaning to the activity or practice of the individual. Bourdieu argues that several elements such as the individual's beliefs, values, position and past experiences will influence the individual in the practice that the individual will adopt. Therefore, individuals will have different relations to the broader fields within which they operate (Gomez, 2011:141). Embodying and understanding Bourdieu's interpretation of practice, draws attention to understanding the constituting ideas of field, habitus and capital.

4.6.1 Habitus

For Bourdieu, the social world is a performance whereby practices are merely roles that are acted out by a score or a plan. In this performance of the world, knowledge or objects of knowledge are constructed through a "system of structured, structuring dispositions, the *habitus*, which is constituted in practice and is always oriented towards practical functions". Furthermore, for Bourdieu, practice represents an objectified site which consists of historical and objectified products, structures and habitus (1990:52). In this social world, the objective conditions in which a specific class exists, produces what Bourdieu terms the habitus - which can be in short explained as a set of principles that can both generate as well as organise practices and representations. As habitus generates practice, Nicolini (2012) explains habitus as the "form" of knowing practice – something that gives a sort of "practical" sense to the specific field's system of rules, simply a "way of knowing" that is based on an individual's belonging to or immersion in the field over time.

These objective regulated and regular practices and representations, according to Bourdieu, "can be objectively adapted to their outcomes without presupposing a conscious aiming at

ends or an express mastery of the operations necessary in order to attain them”. However, it may occur that this habitus which gives rise to objective practice, may be enacted with strategic calculation. This conscious strategic calculation may affect the variation in the habitus’ performance – but only on the premise that this variation will produce an expected objective based on its past performance (Bourdieu, 1990:53). The effect of this variation is unconsciously defined and translated and inscribed into the present, yielding an assessment as what to do or what to say in relation to this probable, future objective state that the variation will produce. In correlating these objective probabilities to an individual’s subjective ambitions, it can be seen that the subjective individual does not adjust ambitions to the objective evaluation of its probability of success. Rather, the individual’s dispositions are already compatible with the conditions of the individual and somehow “pre-adapted to their demands”, the result of which is the exclusion of specific practices that are not attainable by the existing disposition (Bourdieu, 1990:54).

In practice, Nicolini (2012) explains that this notion of habitus is what develops into what can be observed or perceived as an individual’s “style”, which allows the individual to have a so-called “repertoire” of moves to continue the practice in the field. Importantly, Nicolini reminds one that habitus is always socially acquired and therefore represents a social phenomenon such as a group or a particular class. Importantly, in this Bourdieusian perspective on practice is the idea that any habitus that is expressed during the enactment of a practice, tends to replicate or reproduce not only the distribution of capital within the specific field, but also the existing positions that constitute this field. Bourdieu describes the characteristics of habitus through a number of helpful points:

- Firstly, habitus constructs knowledge, which can be interpreted as the way through which an individual understands the world.
- Secondly, an individual’s cultural-historical trajectory influences the individual’s identity and attitudes, values or behaviour over many fields within which the individual may be positioned.
- Thirdly, habitus represents a specific moment in time. Particularly, habitus refers to a specific point in time during a practice when an individual uses a particular set of skills to solve a particular problem or make a particular choice.
- Fourthly, habitus is in part an unconscious act due to its arbitrary nature (Webb, Schirato, & Danaher, 2002:38).

4.6.2 Capital

Harker, Mahar and Wilkes (1990) – in an overview of the work of Bourdieu – mention that the definition of capital may be very broad, as it was for Bourdieu. Capital can include “material things (which can have symbolic value), as well as ‘untouchable’ but significant attributes such as prestige, status and authority (referred to as symbolic capital), along with cultural capital (defined as culturally valued taste and consumption patterns)”. For Bourdieu, capital acts as a social relation within a system of exchange, and the term is extended ‘to all the goods, material and symbolic, without distinction, that present themselves as rare and worthy of being sought after in a particular social formation’ (Harker *et al.*, 1990:1). Webb *et al.* argue that fields, however, also constitutes of (and are influenced by) the everyday conflict between individuals or larger groups in an attempt to delineate what constitutes or embodies capital⁵ within the particular field (or organisation) and subsequently how capital is distributed within the field or organisation (2002:22). In accordance with broader understandings of capital and Bourdieu’s application of the concept, the position of an individual within a particular field will determine the relative power the individual possesses within the particular field alongside the capital the individual has. Importantly, the forms or authenticity of capital in a particular field is confined to the field within which that capital is situated (Webb *et al.*, 2002:23).

Bourdieu argues for a constant competition of capital within any field through what Bourdieu labelled *reproduction* or *transformation* (Webb *et al.*, 2002:23). Nicolini (2012) simply explains that capital therefore represents something that an individual seeks to exchange in order to enact a variation in the power and subsequent legitimacy an individual has in the field. According to Bourdieu’s notions of reproduction or transformation, individuals will firstly adjust their expectations within the field according to who they are in terms of identity (such as their backgrounds, social connections etc) and the likelihood of acquiring capital within

⁵ Economic capital refers to the monetary capital an individual possesses, cultural capital refers to the familiarisation and use of cultural institutions, social capital relates to the value of the social relations that exist between people and symbolic capital relates to the prestige and honour of the individual (Ritzer & Stepnisky, 2014:523).

the field. Therefore, Bourdieu argues that these individuals may be more satisfied with their positions, whilst this allows for symbolic domination to continually reproduce. On the other hand, individuals may seek to enhance or transform their positions within a particular field through various attempts, similar to a “gambling” for capital (Webb *et al.*, 2002:24). Bourdieu (1986:47) identified three types of capital: economic capital, cultural capital and social capital. All three dimensions of capital have relevance to the practice of strategising and to the context of strategy consulting. However, of relevance for this discussion is only cultural capital and social capital, as it has the ability to explain the social world, its structure and its function together with economic capital, but which economic capital would not be able to achieve by itself.

4.6.3 Cultural capital

Cultural capital, according to Bourdieu (1986:47) is represented through three states, namely the embodied state, the objectified state and the institutionalised state. The embodied state of capital is represented in the form of longer-term dispositions of the individuals’ body as well as the mind. The objectified state of cultural capital is represented in the form of material goods and things of economic value, and the institutionalised state of cultural capital is more a form of objectification, whereby a degree of credibility, legitimisation and cultural prestige is conferred through institutionalised capital such as a qualification.

The embodied state of cultural capital is based on the principle that this capital is fundamentally linked to the body and the mind of the individual. Cultural capital may be accumulated over time through certain processes such as incorporation and is embodied through things such as knowledge or tastes. Incorporation inherently implies more thoughtful, directive labour and processes, mainly embodied by inculcation⁶ and assimilation. Bourdieu (1986:48) argues that this process of acquisition cannot be done rapidly and at second hand, it is a long process through which the individual must personally invest both labour and time, with the result of this acquisition process being self-improvement of the individual. However, some aspects of embodied cultural capital may also be acquired through less-deliberate inculcation in an informal manner (such as

⁶ Inculcation is the process of instilling or impressing ideas through methods such as repetition or teaching (vocabulary.com, 2019).

immersion within the world of practices, objects and people) with some aspects acquired even unconsciously (Bourdieu, 1986:48; Goulding, 2008:81). This notion of self-improvement implies several other efforts such as sacrifice, hardship and an appetite for acquiring such capital. The acquiring of embodied cultural capital has a broader effect of *legitimation* of the individual, or as Bourdieu argues, a specific cultural competence that the individual has attained (Bourdieu, 1986:47). Since the social conditions through which embodied cultural capital is acquired or transmitted are often ambiguous or disguised, this type of cultural capital is more inclined to function as *symbolic* capital, which is a type of capital that infers legitimate competence of the individual. This legitimate competence has a value in a particular field, whereby its scarcity is derived from how capital is distributed within the field and has value for its owner as it can yield certain profits. However, perhaps the most valuable feature of cultural capital and its symbolic efficacy lies in the logic of this capital's transmission, as it is driven by scarcity of competence within a particular field (Bourdieu, 1986:49).

The objectified state of cultural capital represents capital objectified in material objects and media such as paintings, vehicles and clothing and may be appropriated both symbolically and materially (Bourdieu, 1986:50). According to Bourdieu (1986 in Kraaykamp & van Eijck, 2010:211) objectified cultural capital is distinct from embodied and institutionalised cultural capital as it has the capability of being immediately appropriated. However, this immediate appropriation applies only to the materiality of these objectified objects and not the way through which the objects may eventually be appreciated (e.g. such as the reading of a book or the appreciation of a painting). Bourdieu (1985:15) therefore mentions that objectified cultural capital is “a two-faced reality, a commodity and a symbolic object. Their specifically cultural value and their commercial value remain relatively independent, although the economic sanction may come to reinforce their cultural consecration”. Objectified cultural capital, however, has not been a prominent feature in studies of capital (Kraaykamp & van Eijck, 2010:211).

Lastly, institutionalised cultural capital is usually objectified in the form of educational credentials, such as an academic qualification conferred onto an individual. Bourdieu (1986:51) argues that the difference between simple embodied cultural capital and institutionalised cultural capital is that it is a recognised and guaranteed cultural competence

– whereas embodied cultural capital is to be constantly proven to be recognised. Bourdieu describes this conferral as the “performative magic of the power of instituting” to metaphorically explain the cultural recognition that is imposed by institutional cultural capital.

4.6.4 Social capital

The second significant type of capital of importance for this context as proposed by Bourdieu (1986:51) is the existence of social capital. Social capital, according to Bourdieu, can be explained as the actual resources that are linked to an individual through his or her network of personal relationships through recognition or through mutual acquaintance, basically translating to being a member of a particular group. What makes social capital an interesting phenomenon, is the ability of social capital to possess collectively owned capital acquired through this network of personal connections, which value is constituted by its size and the volume of the capital the network possesses. Bourdieu argues here for the existence of the “multiplier effect” – which is also the reason for social capital’s existence: the profits that membership to this network may yield, embodied either through a material or symbolic nature (1986:52). The symbolic value of this constituted network is produced and reproduced through the way in which the members of the network are able to produce recognition as well as mutual knowledge. This interaction between members implies a social effort through which these exchanges occur continuously and requires a certain amount of effort as well as time. Individuals as social beings are inclined to acquire and maintain social capital as it is through social capital that people are attributed a “worth” of some sorts. Bourdieu argues that a person with higher social capital will exert much less effort to acquaint others in a network, whereby those with less social capital will exert much more effort in order to get acquainted to those who possess more social capital. Those with a higher amount of social capital are also deemed to deliver highly productive work through their sociability in exerting social capital (Bourdieu, 1986:52).

4.6.5 Field

Webb *et al.* (2002:21) defines field as “a series of institutions, rules, rituals, conventions, categories, designations, appointments and titles which constitute an objective hierarchy, and which produce and authorise certain discourses and activities”. However, these fields

are argued to be dynamic and therefore are not simply static representations of specific rules and institutions, but they are also created by the interactions between the elements of rules, institutions as well as practices (Webb *et al.*, 2002:22). In a similar sense, argues Gomez (2011), can organisations be conceptualised as fields, constituting larger fields such as economies or society. Fields develop in historical context and if considered at any given point in time in static format – will represent “structured spaces of positions” (Gomez, 2011:144).

4.6.6 Practice

Bourdieu’s theory of practice is useful in explaining how individuals create or generate similar practices and, in the process, reproduce similar institutions, which relates strongly to the strategic (but tacit) nature of social practice (Nicolini, 2012). In order to understand how practices then constitute social life through the notions of habitus, field and capital, Bourdieu formulates a useful equation that illustrates the equilibrium of practice: Practice = [(Habitus) x (Capital)] + Field (Bourdieu, 1984:101). The equation explains how practice cannot be understood external to the social context in which it is produced (i.e. the field), and that the capital that individuals possess which in relation to their position, power and relations in the field together with the habitus of the individual, constitute the produced or reproduced practice (Gomez, 2011:145).

4.7 WITTGENSTEIN

From a philosophical perspective, Wittgenstein’s concept of the *language game*⁷ offers the potential to make sense of several language-related issues in strategy, such as discursive struggles and the non-linguistic background of social practice in which strategy can be deemed as a lived experience (Mantere, 2011:155-156). Wittgenstein’s theory has informed a diverse audience of other social theorists including Giddens and Bourdieu who have adapted Wittgenstein’s perspectives in the pursuit of understanding language as social phenomenon. Although Wittgenstein has not been adopted to a large extent in strategy as

⁷ The notion of Wittgenstein’s “language game” wavers between “references to simplified and imaginary models of rule-governed observable interaction, and reference to ways in which words are actually used” (Black, 1979:337).

practice, it has been used in two instances: firstly to explore the relationship between strategy practitioners and management scholars (Astley & Zammuto, 1992; Donaldson, 1995) and to examine how strategy labels produce strategy concepts that are specific to the organisation in discourses. The concept of Wittgenstein's language game can potentially enhance understanding within strategy as practice by examining the issue of discursive struggles in the practice of strategy and how the strategy language with its non-linguistic foundation shape how strategy is being practiced (Mantere, 2011:155).

4.8 FOUCAULT

The perspectives of Michel Foucault, another prominent philosopher, provide insight into the understanding of strategic management as discursive and material practices that are governed by a set of rules in terms of what can be done (or even said and read) within strategy (Golsorkhi *et al.*, 2011:10). Foucault identified three sets of practices that are of concern to the strategy as practice domain:

- Organising practices through which we seek to influence others' behaviour and establish practices of power,
- Discursive practices and techniques through which we seek to master our surrounding elements and create a knowledge base, and
- Practices and techniques that we have adopted and by which we seek to govern ourselves (Allard-Poesi, 2011:169).

From a Foucauldian perspective on strategy as practice, the work of Foucault can contribute to understanding practices in the strategic management domain in three ways. Firstly, strategic practices emerge from a multiplicity of conditions that are part of a mechanism of control in the contemporary organisation, which have enabling and constraining implications for the members of organisations. Secondly, practices in strategic management are governed by a set of rules that seek to influence through mechanisms of communication and information. Lastly, strategic practices that are part of practices of self, lead to relationships of knowledge and power through the way that these practices "unfold" through enacting of strategy (Allard-Poesi, 2011:170).

4.9 A NARRATIVE APPROACH

In understanding the narrative approach to understanding strategising, it is important to note that practices are not only considered as something that individuals do, rather, it should be seen as social skills that were unconsciously acquired (de La Ville & Mounoud, 2011:183). The work from de Certeau and Riceour, and de La Ville and Mounoud clarifies various narrative practices that are intrinsic to strategising, by offering insight into the role of strategy texts and its interpretation in enacting strategy (Golsorkhi *et al.*, 2011:10). De La Ville and Mounoud identified six perspectives on how narratives can be assimilated in strategy research:

- The formulation of strategic narratives creates what can be called meta-conversations, in which strategy is formulated by negotiation within this conversation,
- By adopting a Foucauldian perspective on discourse as practice within which the discourse embodies knowledge, and the practice forms part of a larger social practice in which strategy is formulated,
- By understanding the co-existence between “stronger” and “weaker” order narratives within which official discourse aims to dominate interpretations,
- By interpreting strategy texts as mediators through which practitioners understand and give meaning to their actions,
- The embeddedness of strategic texts within their intertextual relations, in which strategy tests are understood as being strategic through the criteria that connects it to the field of strategic management, and
- By understanding the dialectic in reading as activity, in which reading can be understood as both interpreting (through appropriation) and explaining of texts (de La Ville & Mounoud, 2011:186-190).

In essence, the understanding of narratives and the mundane stories that create meaning from the experiences of individuals, enables interaction to contribute in a significant way to strategy as practice.

4.10 SITUATED LEARNING

The theory of situated learning is concerned with the way in which people learn, not through cognitive development, but through participation in everyday activity (Johnson *et al.*, 2007:38; Henning, 2003:147). Situated learning draws upon theory from popular practice theorists such as Bourdieu, and pragmatists such as Dewey to illustrate how the learning process is about becoming a member of a community (or communities) of practice in broader social systems (Johnson *et al.*, 2007:38-39). With a focus on the social context in learning, situated learning supposes that due to the social nature of the community of practice, social relationships will exist through which an individual will learn through participating in activity. Within these communities of practice, the individuals participating continuously develop and share practices and learn through constant interaction with other individuals within the group. Their participation in activities allows them to develop not only in an intellectual capacity, but also develop personally and professionally as part of this community of practice, such as a group of engineers, accountants or strategic planners (Lave & Wenger, 1991 in Mills, 2011:349). Therefore, the individual is not only defined by, but also defines the relationships encountered within this community of practice (Mills, 2011:349).

Mastering the practice of the community the individual participates in, would mean that an individual would need to master the complete activity system, therefore embracing all the tacit rules, signs, tools and artefacts that are implicit to the practice. These tacit skills are entrenched in the details or minutiae of this activity and can therefore only be understood to be learnt through direct participation (Johnson *et al.*, 2007:39). Mills (2011:349) argues that communities of practice also share resources within the group, which could include discourse and narratives to experiences and even artefacts. Situated learning is located towards the micro-level of the micro-macro spectrum and is more concerned with the process side of the traditional strategic management theory and offers helpful models not only for theoretic understanding, but also for empirical research (Johnson *et al.*, 2007:40).

4.11 THE CARNEGIE TRADITION

The American-based Carnegie School is directly associated with some of the leading

seminal authors in strategy as practice such as March and Simon (1958), Cyert and March (1963) and Simon (1947). It is predominantly focused on studying organisations as a primary subject with a central focus on decision-making perspectives and behavioural plausibility as fundamental to building theory (Gavetti, Levinthal & Ocasio, 2007:523). With its predominant focus on organisational behaviour, the Carnegie School has contributed to two major relevant research streams to strategy as practice: that of organisational sensemaking and organisational routines and capabilities. Both of these are based on the Carnegie School's notion of *bounded rationality*⁸ that stemmed from the School's neo-classical economic thinking (Argote, McEviley & Reagans, 2003 in Johnson *et al.*, 2007:40).

The Carnegie School was not necessarily dogmatic in its pursuit of theory development. The theory that the School produced became pluralistic and yielded in-depth knowledge and insight into organisations, providing critical theoretical direction for contemporary organisational studies (Gavetti *et al.*, 2007:523). The School incorporated various approaches and theories, ranging from agency theory to institutional theory and even population ecology and contingency theory (Gavetti *et al.*, 2007:524). However, most of the work produced by the Carnegie School is underpinned by three theoretical pillars, namely human and bounded rationality, decision-making structures and cooperation and conflicting interest (Gavetti *et al.*, 2007:526-527).

The most important contributions to organisational theory produced by the Carnegie School relate to the understanding about the organisational environment as well as the broader societal context in which the organisation operates (Gavetti *et al.*, 2007:524). Traditional focus on decision-making has shifted to learning and routines as well as change and adaptation. Furthermore, the level of analysis has since moved from an organisational level to both more micro and more macro levels of analysis (Gavetti *et al.*, 2007:523). The Carnegie School presuppose that organisations are unique and individual social institutions are shaped by the human behaviour and relations in the organisation, as well as its external environments. It further argues that organisations can be distinguished from other

⁸ Bounded rationality challenged human rationality by arguing that the individual will rely on incomplete preferences and limited individual knowledge gained from past routines, rather than making new decisions (Gavetti *et al.*, 2007:526; Johnson *et al.*, 2007:40).

institutions and social entities through the way organisations survive through thorough coordination of individuals and groups within the organisation (Gavetti *et al.*, 2007:525).

4.12 SENSEMAKING

Sensemaking is a process of social construction through which individuals work to understand new and ambiguous events that might interrupt ongoing activity, or violate the individual's expectations (Maitlis & Christianson, 2014:57; Maitlis & Sonenshein, 2010:551). It relates to the theoretical pillar of *bounded rationality* in the Carnegie Tradition by addressing the question of how individuals make sense of the world if they are only reliant on their own, limited previous knowledge (Johnson *et al.*, 2007:40). Weick and Sutcliffe (2005:410) explain sensemaking as the experience of an organisation being exposed to ambiguous and unpredictable situations, in search of an answer to the question of "what is the story?" The answer takes shape in the form a sensible "story" that gives rise to and is validated by the type of activity that follows (Weick & Sutcliffe, 2005:410).

In the specific (and relevant) context of strategic change, Rouleau (2005:1415) explains sensemaking as the way in which individuals (mostly managers) "understand, interpret and create sense for themselves" based on the information that is supplied to them. This sensemaking process involves a retrospective development of possible explanations that ultimately rationalise what individuals are doing (Weick, Sutcliffe & Obstfeld, 2005 in Maitlis & Sonenshein, 2010:551) and has become a focal point in organisational studies (Maitlis & Christianson, 2014:58). The body of knowledge on sensemaking as central activity in organisations is rapidly growing (Monin, Noorderhaven, Vaara & Kroon, 2013 in Maitlis & Christianson, 2014:58), as sensemaking has been recognised to impact key organisational processes and outcomes such as decision-making and strategic change (Sonenshein, 2010 in Maitlis & Christianson, 2014:58). In strategy as practice, sensemaking is portrayed on two different ends: one focused on sensemaking as an individual and cognitive process (e.g. Klein, Moon & Hoffman, 2006 in Maitlis & Christianson, 2014:58) and on the other end as a more social and discursive process (Weick, Sutcliffe & Obstfeld, 2005:414)). Either way, sensemaking involves a more active authoring of events as well as frameworks for understanding events, as individuals are part of the situations they attempt to understand (Weick *et al.*, 2005 in Maitlis & Christianson, 2014:58).

Alongside sensemaking, Gioia and Thomas (1996) identified the concept of sensegiving. While sensemaking is concerned with individuals making sense of communicated change, sensegiving is concerned with managerial attempts to influence the outcome of change by expressing or communicating thoughts about change to others and to garner support for strategic change (Rouleau, 2005:1414). However, sensemaking and sensegiving should not be conceived in isolation. Gioia and Thomas (1996) argue that they are essentially reciprocal and complementary processes (Rouleau, 2005:1415). These two processes might appear conceptually different, but Rouleau (2005:1415) argues that these processes can be termed as “two sides of the same coin, one implies the other and cannot exist without it”.

4.13 ROUTINES AND CAPABILITIES

The second perspective that developed from the Carnegie School tradition is that of organisational routines and capabilities, which emerged from work into standard operating procedures. Since, routines and capabilities have found its way not only being integrated into the widespread resource-based view as competitive advantage, but also into the wider management research discipline as central constructs (Felin *et al.*, 2012:1351; Johnson *et al.*, 2007:42). Routines can be defined as “standard behaviours, rules of thumb or even strategies that are used, consciously or not, in a largely repetitive fashion” (Johnson *et al.*, 2007:42). Routines can be established and/or found at several levels, ranging from the actions of production line employees to more complex heuristics such as “always be number one or number two in all your markets” (Cohen, Burkhart, Dosi, Egid, Mareno & Winter, 1996 in Johnson *et al.*, 2007:42). Capabilities on the other hand, refer to the organisation’s ability to produce and integrate these routines in innovative ways. When taking a micro level perspective in comparing particular organisations, both routines and capabilities can be identified as sources of competitive advantage either through strategy process or through strategy content (Johnson *et al.*, 2007:42). Johnson *et al.* (2007:42) argue that the more micro these routines and capabilities are in the organisation, the less likely these routines and capabilities are to be imitated and/or adopted by the organisation’s competitors.

The Carnegie Tradition with regards to routines and capabilities focuses heavily towards the detailed activities that constitute organisational processes, but a large proportion of the

research continues to be “semi-detached”, through taking distant methodological approaches such as Zollo and Singh (2004) in their study of routines through means of survey (Johnson *et al.*, 2003 in Johnson *et al.*, 2007:42). This distant approach allows for little acknowledgement of human agency in routines and therefore becomes rather objectified approaches (Johnson *et al.*, 2007:42).

In an attempt to take the research on routines and capabilities closer to the micro, Feldman and Pentland (2003) developed distinctions between the standard and ideal routines (also referred to as ostensive routines) and what is actually enacted in the organisation, also called performative routines by adopting theoretical perspectives of Bourdieu and Giddens as well as Latour. From a strategy as practice perspective, Howard-Greville (2005 in Johnson *et al.*, 2007:42) identified the potential for flexibility in performative routines through a study of technology roadmapping. However, the central concern of routines in the strategy as practice perspective relates to how routines are actually performed in the organisational environment (Johnson *et al.*, 2007:42). Whilst some progress has been made, the microfoundations of routines and capabilities remain largely untouched (Felin *et al.*, 2012:1351).

4.14 NEO-INSTITUTIONAL THEORY

Developed from similar theoretical roots as the Carnegie Tradition, the most dominant form of institutional theory is neo-institutional theory, which came into existence during the 1970s as response to the notion of perfect economically rational organisations (Johnson *et al.*, 2007:43; Suddaby, Seidl & Lê, 2013:329). This conformation to economic rationality was largely driven by the desire for legitimacy by organisations in the eyes of more powerful external entities (Johnson *et al.*, 2007:43). Whilst old institutionalism was rooted in the notion that organisations behave in contradictory ways to economic expectation by rather responding to beliefs that are socially constructed, neo-institutionalism became focused in how the interactions between organisational individuals can influence competitive decisions and organisational behaviour (Suddaby *et al.*, 2013:330). Neo-institutional theory is focused on the macro end of the micro-macro continuum and emphasises the norms and rules in the institutional environment that prescribes how organisations should be (Johnson *et al.*, 2007:43; Suddaby *et al.*, 2013:330). It aims to explain the influence of institutional

environments to account for certain organisational strategies such as diversification and institution of key organisational positions (Johnson *et al.*, 2007:43). It is a well-established theoretical domain with strong theoretical and empirical focus that dates back several decades with its roots in old institutionalism (DiMaggio & Powell, 1983; in Suddaby *et al.*, 2013:329). Neo-institutional theory continues to build on the work from three seminal contributions, including Zucker (1977) with a focus on the micro-processes through which authority is institutionalised, Meyer and Rowan (1977) who investigated the attribution of rationality and DiMaggio and Powell (1983) who introduced the concept of isomorphism (Suddaby, 2010:16).

One of the key constructs in institutionalism is that of *rational myths* (Meyer & Rowan, 1977 in Suddaby *et al.*, 2013:331). Rational myths refer to the widely held, but unverified assumptions about the behaviour organisations ought to adopt in order to effect proper organisational functioning. It argues that organisations do not necessarily adopt practices to enhance organisational performance, but rather for its legitimacy effects for it to appear economically rational (Suddaby *et al.*, 2013:331). These rationalised myths are widespread through larger populations of organisations, regardless of whether they have been tested or argued to improve organisational performance (Tolber & Zucker, 1983 in Suddaby *et al.*, 2013:331). Stemming from this diffusion of rational myths, DiMaggio and Powell (1983) introduces the important concept of *isomorphism*. Isomorphism relates to how organisations increasingly converge in both structure and processes as an organisational field itself becomes more structured. The contemporary neo-institutional theory adopts these concepts to explain certain organisational processes such as entrepreneurship and change (Suddaby *et al.*, 2013:331).

Suddaby *et al.* (2013:330) argue that both neo-institutional theory and strategy as practice perspectives can be utilised to study organisations and have therefore identified overlapping areas to further argue that these domains are in fact, complementary approaches to another. This movement towards using the two approaches as complementary also responds to increasing calls to identify linkages between strategic management and organisational theory (Durand, 2012 in Suddaby *et al.*, 2013:329) Suddaby *et al.* (2013) therefore set out to identify several ways in which neo-institutional theory with its focus on organisations and strategy as practice with its focus on strategic management, could complement each other

in response to the current, dominant thoughts and assumptions of economic rationality (Suddaby *et al.*, 2013:330).

The criticisms of neo-institutional theory such as a lack of focus on process, micro-dynamics, individuals and organisational practices are (perhaps not surprisingly) the foundations of strategy as practice (Suddaby *et al.*, 2013:33). Criticisms of strategy as practice on the other hand include the lack of focus on broader cognitive schemes, the social construction of *actorhood*⁹ and the role of social institutions in producing and maintaining practices (Suddaby *et al.*, 2013:330). Recently, papers combining insight from both perspectives have been emerging (Helms, Oliver & Webb, 2012; Jarzabkowski, Matthiesen & Van de Ven, 2009; Smets, Morris & Greenwood, 2012), signalling an effort of both perspectives evolving toward common ground. Suddaby *et al.* subsequently identified an overlap in three areas through which both perspectives:

- Have a distinct focus on the actual doing of organisational individuals,
- Overlap in their shared cognitions, and
- Value the role of language in creating shared meanings (Suddaby *et al.*, 2013:329-330).

4.15 ACTOR-NETWORK THEORY

Actor-network theory originated from the sociology of science and is concerned with the key methodological principle of “following the actor” to discover how knowledge is produced, by whom knowledge is produced and to examine the tools or skills that were used in producing this knowledge. It is particularly useful for strategy as practice due to its breadth of application and its challenge of the dualities in the traditional strategic management literature. Actor-network theory originated in micro-level studies of technologists in their laboratories and therefore concentrates heavily on what people are actually doing (Johnson *et al.*, 2007:45). The theory offers three ways to challenge traditional theoretical approaches: not only does it challenge the arbitrary nature of macro and micro, but it also emphasises the temporality of social phenomena in that social reality stops to exist as soon as people

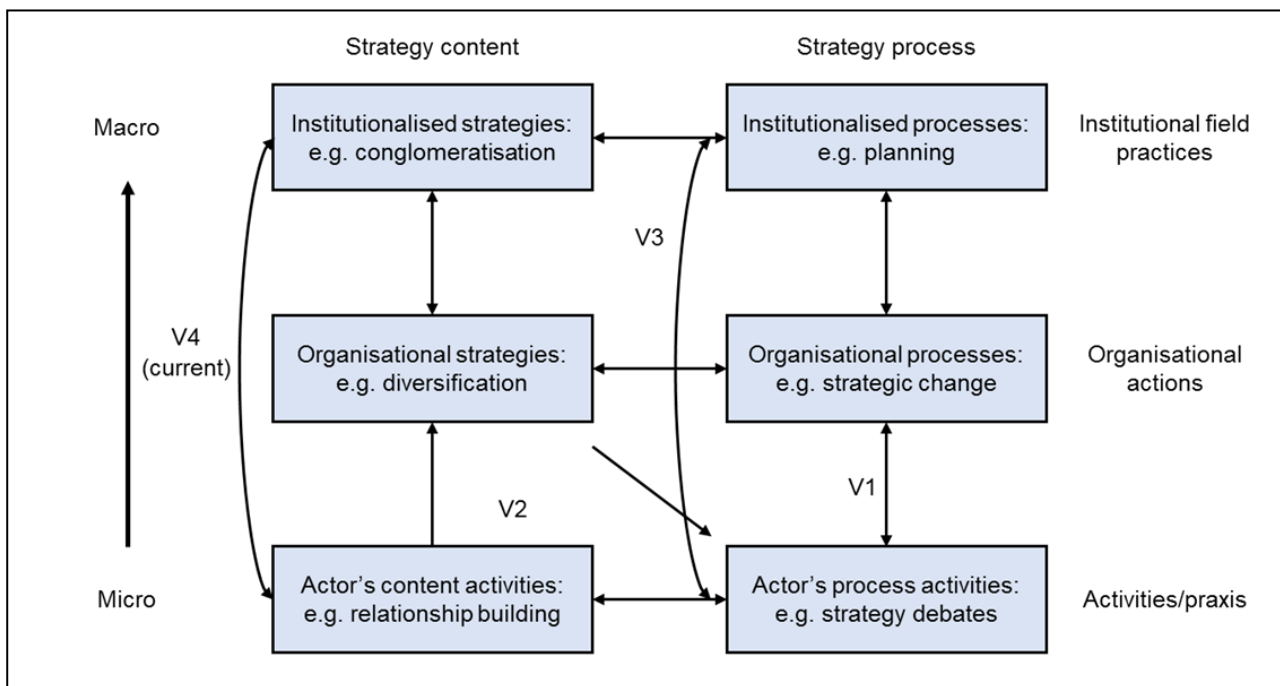
⁹ Actorhood refers to organisations that endow themselves as “entities having identity, purpose, and industry membership, and with the capability for acting in ways that are consistent with these claims” (Meyer, 2016 in Halgin, Glynn & Rockwell, 2018:648).

stop doing the things that make up social reality. Lastly, it recognises the importance of materials and tools in producing knowledge (Johnson *et al.*, 2007:45-46).

4.16 WHAT IS THE RESEARCH AGENDA?

Research in the strategy as practice domain has evolved into several directions. Whilst some are concerned with processes of strategy such as Maitlis and Lawrence (2003) and Regnér (2003), others are more focused on people (Mantere, 2005) or their interaction in sensemaking of strategy (Balogun & Johnson, 2004). Others have been concerned with the talk of people: discourse has been the focus for Samra-Fredericks (2003) whilst others such as Jarzabkowski (2004) focused on non-human materials such as tools (Johnson *et al.*, 2007:15). Nevertheless, to understand the research agenda of strategy as practice, it is important to understand the potential of strategic management in terms of its current orientation and the levels relevant to strategy as practice (Johnson *et al.*, 2007:16). Johnson *et al.* (2007) provides a helpful illustration of such an expanded map of strategic management that allows for further discovery of the research agenda, as depicted below in Figure 4.6. The figure warrants a brief explanation that follows below.

Figure 4.6: An exploded map of strategic management



Source: Adapted from Johnson *et al.* (2007:18).

In brief, the map of strategic management shows the current relevant levels of strategy, namely the micro and the macro, with the orientation of the current strategic management discipline in the vertical centre, denoted by “current”. The map illustrates how organisational decisions are linked to organisational performance (Rumelt, Schendel & Teece, 1994 in Johnson *et al.*, 2007:16). It is presented in simplified format: the strategy content side on the left implicitly includes more organisational strategies such as internationalisation or merger and the process side on the right implicitly includes more processes such as the implementation of strategy (Johnson *et al.*, 2007:16). The levels above and below the current research level does not represent the traditional strategy research. The more macro level on the upper level is concerned with institutional level practices and the lower micro level is concerned with micro practices, which focus essentially on the activities of those individuals that produce and deliver strategy. The focus of strategy as practice is inherently on exploration of the lower levels over both strategy content and strategy process. Four important research objectives stem from the map of strategic management research that are critical to aid our understanding of linkages with other streams of strategic management (Golsorkhi *et al.*, 2011:12; Johnson *et al.*, 2007:21-23):

- Examining the link between the activities of individuals and processes at the organisational level (V1),
- Examining the link between the activities that occur in organisations, and the higher-level organisation strategies of the same organisations (V2),
- Examining the relationship between individual’s activities in organisations and strategic management processes that have been institutionalised (V3), and
- Examining the strategies that have already been institutionalised (V4).

From a conceptual perspective, Jarzabkowski and Spee (2009:74) provides a very useful matrix of approaching the literature in strategy as practice, as depicted in Figure 4.7. This perspective is based on the conceptual framework of Jarzabkowski *et al.* (2007) as illustrated in Figure 3.2. By integrating the various levels of praxis with the type of practitioner, they are able to establish nine research domains that frames a future research agenda for strategy as practice. They stress two major necessities of the strategy as practice agenda namely: the establishment of linkages between micro and macro level phenomena, and the necessity of developing outcomes (Jarzabkowski & Spee, 2009:75).

Although strategy as practice advocates a focus on microfoundations, strategy as practice scholars emphasise that connections between micro and macro would make localised interactions explicit and expose what shapes and is shaped by wider organisational and social contexts (Carter *et al.*, 2008; Chia, 2004 in Jarzabkowski & Spee, 2009:75).

Figure 4.7: Strategy as practice by practitioner and level of praxis

Level of praxis	macro	<p>C Macro praxis of the individual actor</p> <p>n Empirical = 1 n Theoretical = 0</p>	<p>F Macro praxis of the aggregate actor</p> <p>n Empirical = 1 n Theoretical = 2</p>	<p>I Macro praxis of the extra-organisational actor</p> <p>n Empirical = 1 n Theoretical = 8</p>
	meso	<p>B Meso praxis of the individual actor</p> <p>n Empirical = 3 n Theoretical = 0</p>	<p>E Macro praxis of the aggregate actor</p> <p>n Empirical = 16 n Theoretical = 0</p>	<p>H Macro praxis of the extra-organisational actor</p> <p>n Empirical = 1 n Theoretical = 0</p>
	micro	<p>A Micro praxis of the individual actor</p> <p>n Empirical = 6 n Theoretical = 1</p>	<p>D Micro praxis of the aggregate actor</p> <p>n Empirical = 6 n Theoretical = 1</p>	<p>G Micro praxis of the extra-organisational actor</p> <p>n Empirical = 0 n Theoretical = 1</p>
		individual actor within organisation	aggregate actor within organisation	extra-organisational aggregate actor
Type of practitioner				

Source: Jarzabkowski & Spee (2009:74).

- Domain A focuses on research that examines the practitioner of strategy as the individual actor and its micro levels of praxis, such as the studies of Mantere (2005, 2008) who

examined how individuals' experience shape their personal strategy praxis as well as Beech and Johnson (2005), who studied strategy-making dynamics of individuals within the upper echelons (Jarzabkowski & Spee, 2009:74).

- Domain B includes research that explain the role of the individual in organisation-level praxis. This domain includes studies such as Rouleau (2005) who studied the practitioner's influence on organisational strategy and Stensaker and Falkenberg (2007) who studied this influence on specific business units within the organisation (Jarzabkowski & Spee, 2009:75).
- Domain C examines the relationship between the organisational individual and the presence of macro-praxis where macro is focused on the market or institutional level. Such studies include Vaara *et al.* (2004) who examined the widespread diffusion and institutionalisation of alliances in the airline industry.
- Domain D focuses on studies that examine the practitioners of strategy as aggregate actors and their micro praxis, such as the studies of Molloy and Whittington (2005) that explained how these individuals created their micro praxis by drawing upon past experiences in decision-making (Jarzabkowski & Spee, 2009:76).
- Domain E includes research that focuses on a particular class of aggregate individuals such as the executive managers (Jarzabkowski, 2003) and middle managers (Balogun & Johnson, 2005), or multiple groups of aggregate individuals such as corporate and peripheral individuals (Paroutis & Pettigrew, 2007): mostly examining the different praxis among these various groups (Jarzabkowski & Spee, 2009:77).
- Domain F is concerned with the relationship between aggregate individuals at organisational level and the macro-praxis that exist within the institutional environment. This domain includes studies such as Hodgkinson, Whittington, Johnson and Schwarz (2006) who examined the diffusion of strategy workshops across a variety of industries (Jarzabkowski & Spee, 2009:78).
- Domain G focuses on how the extra-organisational (external) practitioner (those outside the organisation such as the strategy consultants or business school lecturers) construct praxis on a micro level. Here, studies such as those by Hodgkinson *et al.* who examined the influence of consultants on strategy workshops and Sturdy, Schwarz and Spicer (2006) who examined the influence of consultants on organisational individuals during micro-incidents such as business dinners (Jarzabkowski & Spee, 2009:79).

- Domain H examines the relationship between strategy praxis at the organisational level and the external practitioner. Here, Whittington, Molloy, Mayer and Smith (2006) illustrated how governmental policies and political pressures shape discourse in strategy workshops and the influence of external strategy consultants on an organisation's strategic planning processes (Sminia, 2005 in Jarzabkowski & Spee, 2009:79).
- Lastly, Domain I includes research that analyses the association between external practitioners and institutional-level macro praxis. This domain includes research from Melin and Nordqvist (2007) who focused on the role of researchers and policymakers on the institutionalisation of distinct business forms, as well as Seidl (2007) who examined the institutionalisation of discourses concerned with strategy (Jarzabkowski & Spee, 2009:80).

Despite the various proposed research agendas and multitude of approaches to strategy as practice research, research efforts and agendas are typically overlapping. Golsorkhi *et al.*, proposes that future strategy as practice research strengthen connections to the strategy process approach, incorporates institutional approaches to strategy and its contemporary applications, examine sensemaking and cognition within the strategy domain and enhance the notions of learning and communication in the strategic management discipline (2011:12). Supporting the strides of strategy as practice in both empirical and theoretical contribution, Golsorkhi *et al.* also advocate for the continuation of the way in which both theories and methodologies from the social sciences are incorporated in strategy as practice. They argue that an intense analysis of strategising within and outside the organisation can enhance the ways in which various traditions such as Giddens, Bourdieu and Foucault can be applied in understanding important and complex issues within contemporary organisations. Future research efforts on both empirical and theoretical analysis should continue and should be aimed at enhancing our understanding of the practices, processes and activities that underpin strategising in organisations. Golsorkhi *et al.* propose varying themes that include “linkage of the macro and micro in strategy, agency in strategy and strategising, coping and resistance, practitioners and their knowledge, spread of strategy as discourse and praxis to new areas, cross-national comparisons, longitudinal analyses and the role of history, mediation and technologisation of discourse and practice” (2011:13-14).

4.16.1 What has been researched?

Although the strategy as practice research agenda has gained substantial momentum, there is still major work to be completed in order to develop the field into a robust field of research (Jarzabkowski, Balogun & Seidl, 2007:5). From a theoretical perspective there has been tremendous contribution to strategy as practice from various fields such as the Wittgensteinian perspective, Bourdieu, Giddens's structuration theory, critical discourse analysis and Foucault (Seidl & Whittington, 2014:1408). These theoretical perspectives, however, are still making their way into the empirical research of strategy as practice, which has been facing many challenges (Carter, 2013 in Seidl & Whittington, 2014:1408). Strategy as practice scholars constantly seek to enlarge the strategy as practice research agenda in different directions, without losing focus of the micro-level strategising in organisations, in which strategy as practice has its origins (Seidl & Whittington, 2014:1408). Seidl and Whittington (2014:1417) further argue for scholars to pursue practices from micro levels in connecting it to larger phenomena.

Aligned to the classification of Golsorkhi *et al.* (2011:4-5) in their analysis of recent contributions to the strategy as practice literature, the Strategy as Practice International Network¹⁰ presents a comprehensive bibliography with relevant classification of research in strategy as practice. It contains strategy as practice related books, articles, and book chapters that are most relevant to the strategy as practice domain. These are presented in Appendix D.

Chapter 4: introduced the main practice and practice-based theories that may serve as potential explanation of the grounded theory categories that are introduced in Chapter 7: of this thesis. The next chapter turns the focus to the individual/practitioner in practice theory, by highlighting the role of the strategy practitioner and the material artefacts that are central to strategy as practice, with a particular focus on strategy tools.

¹⁰ The Strategy as Practice International Network is an online academic community that consists of more than 3 000 scholars and strategy practitioners from around the world (Strategy as Practice International Network, 2018).

CHAPTER 5: STRATEGY TOOLS

Chapter 4 provided a theoretical overview of the main practice and practice-based theories that may serve as potential explanation of the grounded theory categories that are introduced later in this thesis. This included the core components of practice theory, and an introduction to practice-based theories such as Giddensian structuration theory, activity theory, the activity system, Bourdieu, Wittgenstein, Foucault, a narrative approach to strategy, situated learning, the Carnegie Tradition, sensemaking, routines and capabilities, neo-institutional theory and actor-network theory.

As the practice perspective focuses on the individual and its micro-doings or practices, this chapter introduces the practitioner as core element in the strategy as practice framework. It distinguishes between strategy practitioners that are internal and external to the organisation, and provides an overview of strategy tools as material artefacts that are central to practice, and therefore the strategy as practice perspective. Adopting a practice perspective allows one to conceptualise and analyse the role of strategy tools in strategising, and this chapter provides an introduction to these perspectives, followed by a current classification of strategy tools in the strategy literature.

5.1 INTRODUCTION

In strategy as practice's conceptual framework of praxis, practices and practitioners (refer to Figure 3.3), practitioners remain the primary "research subjects" (Johnson *et al.*, 2007:78). Also called strategists, they are the individuals who are involved in the work of *strategising*, in other words the "doing of strategy" (Whittington, 2006:619). The core question about strategists in the strategy as practice domain is concerned with what strategists *do* (Jarzabkowski *et al.*, 2007). This research question goes beyond elementary lists and classification to the discovery of who strategists are, to understanding how their identity affects what they do. However, to understand this also requires an understanding of what is being *done* (the praxis) and a further understanding of how this affects the practices the practitioner draws upon in the act of strategising (Balogun *et al.*, 2007:202). Balogun *et al.* (2007:203) therefore emphasise the concern of strategy of practice as "*how* strategists do what they do". Strategy as practice is concerned with the influence of strategists'

interpretations, and their intent – how their discourse influences and/or shapes their strategic practice and whether (and how) they act in different situations (Balogun *et al.*, 2007:203). As Balogun *et al.* (2007:203) mention, examining the practices of practitioners focuses heavily on “actions, mental activities, talk, materials and their use, know-how, emotions and motivations”. This study therefore foregrounds the practitioners of strategy (in specific the external strategy consultant) whilst simultaneously drawing heavily upon their use of strategy tools as subset of their practices, in order to achieve the research objective.

The practitioner or *strategist* is deemed an obvious unit of analysis for strategy as practice, as Jarzabkowski (2012) rightly mentions that this “doing” of strategy implies the presence of a practitioner (or strategist), who is either enabled or constrained through the practices that are used in the act of strategy labour. Whittington (2006:619) refers to strategists as the “prime movers” of strategy in the broader concept of strategy work. As mentioned earlier, practices are routines that explicitly portray behaviour, mental activities, knowledge and motivation that are all carried out by people, who could make use of physical devices in the practice of strategising (Schatzki, 2001 in Belmondo & Sargis-Roussel, 2015:92). Furthermore, it is inevitable that all research conducted in strategy as practice engage with the strategist to some extent (Johnson *et al.*, 2007:78).

5.2 PRACTITIONERS AS STRATEGISTS

In the traditional strategic management literature, studies of strategists have been focused on the upper echelons, such as the executive management or senior management. The literature is still dominated by an emphasis on top managers and their connection with strategy formulation and decision-making processes (Hambrick & Mason, 1984; Wiersema & Bantel, 1992 in Balogun *et al.*, 2007:202). This approach, however, is not useful to the strategy as practice framework in answering some of the critical questions on the research agenda, such as the role and influence of identity of strategists on organisational strategy. This does not mean that it is not useful to continue studying top managers – scholars such as Jarzabkowski (2005) and Samra-Fredericks (2003) still argue that there is much to be learnt from them in their capacity as significant strategists (Balogun *et al.*, 2007:202). However, growing streams in the strategy as practice literature suggest that the focus should be widened to examine how other organisational individuals may play an important role as

strategists (Floyd & Wooldridge, 1992 in Balogun *et al.*, 2007:202). Managers involved in strategising might be from various backgrounds, functions or occupations, including various professional or academic backgrounds, and may therefore carry different practices, whether occupational or organisational (Belmondo & Sargis-Roussel, 2015:92).

The focus of strategy as practice scholars therefore has to shift beyond those in traditional strategic positions to understanding how those who lack a formal strategic role may also be able to shape strategy, such as middle managers (Balogun, 2003; Floyd & Lane, 2000 in Balogun *et al.*, 2007:202). Middle managers' inclusion in the research agenda, for example, pertains to the decentralisation of contemporary organisations to increase efficient response to environmental challenges, the increased amount of trained and qualified middle managers due to the rise of business education and more knowledgeable managers following a shift from manufacturing to knowledge economies (Johnson *et al.*, 2011:504; Schmid *et al.*, 2010:146). Rouleau and Balogun (2011:954) argue that not much is known about how these middle managers influence the organisation strategically in an upwards, downwards and lateral manner. This statement can be extended, however, beyond even the current view on strategists. There are many other organisational practitioners who might also do strategy work at some stage in their careers or as part of a wider role (Grant, 2003; Mantere, 2005 in Whittington, 2006:619). As strategy as practice acknowledges the linkages between traditional dichotomies of strategy formulation and implementation, strategy content and process, emergent strategy and deliberate strategy, it requires the research net to be cast upon a wider group of strategy practitioners (Balogun *et al.*, 2003 in Balogun *et al.*, 2007:202).

In light of this requirement, strategy practitioners can also be found outside of the organisation. Portraying a prominent role in the institutional environment of strategy are, for example, the strategy consultants from the world's leading consulting firms such as Bain & Company (Bain & Co.) and the Boston Consulting Group (McKenna, 2006 in Whittington, 2006:619). There are also other advisers from various industries who are involved in strategy and strategising, such as business school lecturers and even corporate lawyers (Balogun *et al.*, 2007; Clark, 2004) – all of whom can be understood as the practitioners of organisational strategy (Whittington, 2006:619).

5.3 INTERNAL STRATEGY PRACTITIONERS

Internal strategists could include members from the organisation's executive management such as top managers and directors, strategic planners or strategy consultants from planning departments as well as middle managers within the organisation (Johnson *et al.*, 2011:500-7). The traditional approach to strategy has seen strategising as an activity that is performed exclusively by the top management and the elite of the organisation. It mostly excluded non-executives as they were seen as not experienced or authoritative for the consultative roles they were to play in strategy development. There was a clear separation of top management from any operational responsibilities within the organisation due to their "strategic" focus (Johnson *et al.*, 2011:500). Alongside executives in the traditional approach to strategy are strategic planners, who mainly support executive management with strategic management. They usually have a responsibility to coordinate strategic planning through effective communication, teamwork and influencing skills and their tasks mostly include analysis and the management of strategic processes (Johnson *et al.*, 2011:501; Whittington, Yakis-Douglas, Ahn, & Cailluet, 2017). The exclusivity of executive management in strategy has brought along some issues for strategising in practice, such as the excessive personalisation of organisational strategies where the role of strategising is centralised around single positions or teams, and the inherent bias (agency) certain executives might exhibit towards advancing their own operational and departmental responsibilities. Furthermore, the issue of "groupthink" could also influence a team's ability to develop effective, rational strategies (Eaton, 2001; Johnson *et al.*, 2011:500-501). Managers from all levels within the organisation could potentially influence strategy development, especially when they hold key positions or have access to social capital and especially when they form part of strategic discourse within the organisation (Boyett & Currie, 2004:51; Johnson *et al.*, 2011:505). The manager's role is therefore crucial as important source of information, as linkage between upper levels of management and organisational members on lower levels through sensemaking of strategy, in the reinterpretation and adjustment of organisational responses to strategic changes and often as champions of ideas that drive organisational strategy (Hope, 2010; Johnson *et al.*, 2011:504; Rouleau, 2005).

5.4 EXTERNAL STRATEGY PRACTITIONERS

The practitioners of an organisation's strategy could also include strategy advisors from external strategy consulting firms (Beer & Eisenstat, 1996:601, Johnson *et al.*, 2011:499; Whittington, 2006). These strategy consultants often play a critical role in strategising as they can introduce, alter and legitimise new strategy practices in organisations and even across an industry. Prominent strategy consultants within this industry include consultants from global consulting firms such as McKinsey & Company., Bain & Co. and the Boston Consulting Group (BCG). Major consulting firms such as BCG had its origins in economic principles, and many other consulting firms have since copied their tools in response to growing market shares (Ghemawat, 2002:45). There are often also other strategy advisors from non-strategy environments including investment bankers and business school lecturers (Clark, 2004), who can also be considered strategists (Whittington, 2006:619). Several global trends such as digitalisation and open strategy have recently further expanded the opportunities for strategy consultants and advisors within the global market (Werr & Styhre, 2002:44).

The relationship between strategy consultants and organisations is often ambiguous and controversial, and is an area that has generally been under-researched. There are several instances of contradictory ideas or mixed feelings about these relationships as organisations often assume that external advisors have superior strategy knowledge as their approaches, skills and impression management often depict the organisation as a "vulnerable" entity that needs the consultant's expert assistance (Werr & Styhre, 2002:44). This criticism is not new. During the 1980s, scholars Hayes and Abernathy (1980) became critical too of the analytical techniques that most of these consulting firms deployed, arguing that they promoted analytical detachment rather than insight from experience, together with a short-term focus instead of the development of long-term competitiveness (Ghemawat, 2002:51). Furthermore, the presence of external strategy consultants is sometimes deemed as controversial, as their generally higher consulting fees are very often paired with poor results, mainly due to a lack of proper client briefs and poor management processes (Johnson *et al.*, 2011:506). Their perceived importance, however, continues to grow as the turnover of the world's largest consulting firms have shown tremendous recent growth

(Whittington, 2002:1). External strategy consultants continue to fulfil a variety of roles in the development of organisational strategy:

- Strategy consultants analyse, prioritise and generate strategic options,
- Strategy consultants transfer new knowledge to an organisation,
- Strategy consultants promote strategic decisions, and
- Strategy consultants often assist with the implementation of strategic decisions (Johnson *et al.*, 2011:505-6).

Academics themselves could also be or become strategy consultants. In their roles as strategy consultants, they tend to emphasise the more formal techniques and approaches and not necessarily the everyday activities of enacting strategy. Polanyi (1966) argues that when a strategy practitioner reaches expert status in his or her subject field, the tacit knowledge they have used to advance their practices in their strategy work, may become unconscious. Therefore, the most suitable “researcher” to render this knowledge explicit may actually be apprentice-novices, who will get to learn the practices of experienced consultants and articulate the learning by being in close proximity to the consultant (Johnson *et al.*, 2007:78). This points to a valuable approach in eliciting knowledge from a strategy practitioner, but can be a particularly demanding observation (Johnson *et al.*, 2007:79). It should be acknowledged that apprentices of strategy might not always be able to extract knowledge from traditional published papers. It is imperative to find alternatives to communicate and share the relevant practice knowledge from studies in strategy as practice, giving rise to new pedagogical tools and teaching methods. This strengthens the case for collaboration with other fields and disciplines (Germain & Josserand, 2013; Johnson *et al.*, 2007:79).

The experience of strategists provides an attractive avenue for research on practitioners within the strategy as practice domain. In observing and interviewing experienced strategists, we can make their expertise explicit and produce insight into their tacit knowledge about the practice of strategy. This is an important notion in studying strategy from a practice lens: it should be considered that the knowledge of a particular practice might only be acquired once a strategist participates in the specific practice, which follows the theoretical orientation of the situated learning perspective. This argument gives rise to the consideration of appropriate methodologies in strategy as practice to capture this type of

knowledge (Johnson *et al.*, 2007:78; Vaara & Whittington, 2012). This approach would also allow insight into the influential strategy practices of strategy consultants. Understanding the origins of these strategy practices allow strategy practitioners to become more effective in the production of new strategy practices. It is therefore important to have a close engagement with strategy practitioners' detailed activities in order to understand how practices are generated or created, and how praxis are construed (Whittington, 2006:625). This is important in empirical research as there are concerns about the implementation of unknown and untested strategy practices, especially with regard to the density and independence of the networks through which these new practices often spread (Ghemawat, 2002 in Whittington, 2006:625).

5.5 STRATEGY TOOLS AS MATERIAL OBJECTS IN STRATEGISING

Aligned with the strategy as practice perspective that strategy should be studied as something that strategists do, there is an increased focus on the material objects that are embedded in the doing of strategy (Jarzabkowski, Spee & Smets, 2013:41). These material objects refer to things such as PowerPoint presentations, Excel spreadsheets, whiteboards and other materials through which strategists do their strategy work (Jarzabkowski & Whittington, 2008; Kaplan, 2011 in Jarzabkowski *et al.*, 2013:41). Part of the notion of strategising with "stuff" (Whittington, 2007 in Jarzabkowski *et al.*, 2013:41) and particularly the move towards micro-behavioural processes is the use of essential strategy tools (Gunn & Williams, 2007:201) that strategists may use on a daily basis (Jarzabkowski & Wilson, 2006; Whittington, 2006). The use of strategy tools have long been vital to the core of traditional strategic planning (Gunn & Williams, 2007:201) and they have become institutionalised strategy practices in several industries – they are also available in almost any organisation (Jarzabkowski, 2004 in Belmondo & Sargis-Roussel, 2015:92).

The use of strategy tools is fundamental to the formulation of strategy (Gunn & Williams, 2007:202), highlighted by many strategy scholars such as Clark (1997), Dyson (1990) and Langley (1989). As practices in the strategising process, strategy tools carry with them meaning, language and normativity (Schatzki, 2001:21). They are essential in the way that they are drawn upon to produce what Whittington terms *artful praxis* (2006:620). Strategy tools constitute an entire subset of strategy practices (Jarzabkowski, 2012) and have

typically been associated with the developments in traditional strategy literature (Bowman *et al.*, 2002; Rigby, 2001) that produced its own strategy tools and incorporated tools that have been developed within other disciplines (Day *et al.*, 1990).

The study of strategy tools as strategic practices is perhaps best fit for the practice-based context in the strategy as practice perspective. However, the role that strategy tools enact in the development of strategy has largely been neglected within this larger dominating European-based practice theory (Gunn & Williams, 2007:201). Despite having relative popularity as institutionalised strategic practices, there is a general lack of understanding on both *how* and *why* practitioners use certain strategy tools during strategising. Despite their institutionalisation, prevalence and popularity, there is a general lack of understanding by scholars on how (and why) practitioners use strategy tools during strategising, which is characteristically taught in management education or business school (Giulietti, Oliveira & Amoo, 2013:4; Hodgkinson, Whittington, Johnson & Schwarz, 2006; Jarzabkowski *et al.*, 2007; Jarzabkowski *et al.*, 2013; Jarzabkowski & Spee, 2009; Wright, Paroutis & Blettner, 2013). This understanding of how (and why) strategy practitioners use certain strategy tools are perhaps the more difficult phenomenon to research. However, the necessity to include this phenomenon in the strategy as practice research relates to exploring the motivation or rationale for using particular tools, how dissemination processes occur in applying strategy tools and to develop practice-based understandings of their application (Gunn & Williams, 2007:202). Strategy as practice emphasises the need for scholars to study the use of strategy tools, as these strategy tools are often embodied theories that are mostly developed by the academics. Furthermore, strategy tools are pervasive and even when not used during strategising, the practitioners of strategy still adopt the concepts, language and frameworks in their strategic discourse (Jarzabkowski, 2012).

5.5.1 A definition of strategy tools

In the context of strategic management, strategy tools can be defined as “any methods, models, techniques, tools, frameworks, methodologies and approaches which provide decisions support” (Clark & Scott, 1999:36; Clark, 1997:417). The strategy as practice literature conceptualises the term *tool* as “a generic name for frameworks, concepts, models or methods” (Jarzabkowski & Kaplan, 2015:538). This term typically reflects those

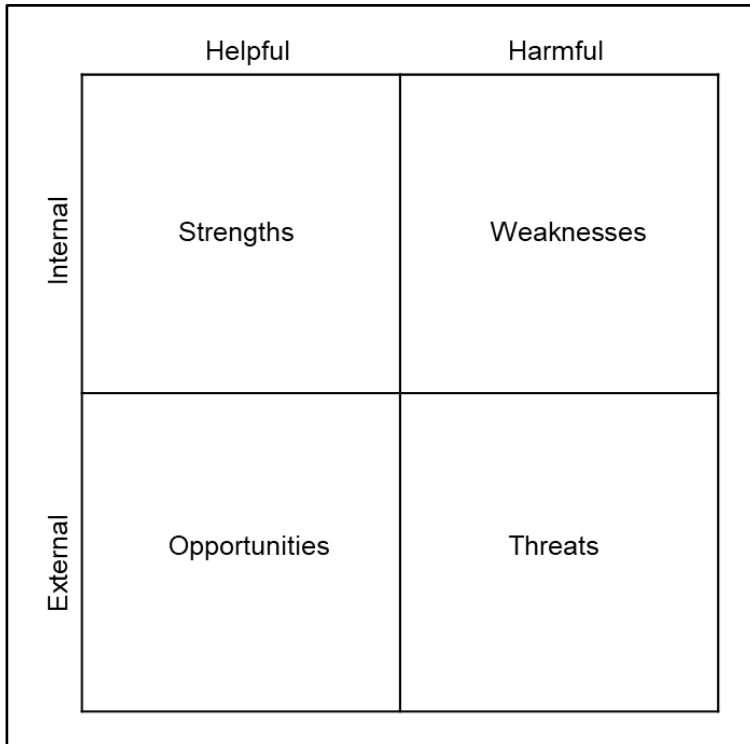
institutionalised traditional strategy tools recognised in strategy practice, such as Porter's Five Forces (Porter, 1980), SWOT analysis (Learned, Christensen & Andrews, 1961), the Value Chain (Porter, 1985), the BCG matrix (Henderson, 1979), Ansoff matrix (Jarratt & Stiles, 2010:29), McKinsey 7S framework and Strategic Group Maps (Wright *et al.*, 2013:95). In the traditional strategic management literature, tools have been presented as mechanisms that provide an approach to a structured strategic analysis and framework for strategy development that is focused on the key strategic issues at hand (Gunn & Williams, 2007 in Jarratt & Stiles, 2010:29). In contrast with this traditional perspective of strategy being embodied as a deliberate, planned approach, the emergent perspective of strategy illustrates that the selection and use of strategy tools in practice, is likely to be very different. It incorporates the notions of "pattern matching" as well as sensemaking as opposed to the traditional structured analysis perspective (Jarratt & Stiles, 2010:28).

The strategy literature has largely neglected the context in which strategy tools have been used (Bharadwaj *et al.*, 2005 in Jarratt & Stiles, 2010:29). In fulfilling the strategy as practice agenda, there has also been an increased focus on *how* strategy tools are being used by strategists (Kaplan, 2011 in Paroutis, Franco & Papadopoulos, 2015:48). In line with this shift in focus to the emergent phenomenon of strategy as practice, Belmondo and Sargis-Roussel (2015:92) conceptualise strategy tools as "interrelated sets of actions, knowledge, intention and language". The meaning that strategy tools carry refers to the way their language represents knowledge and the inherent normativity shapes the intentions of the practitioner who uses the strategy tool by defining acceptable goals (Belmondo & Sargis-Roussel, 2015:92). As an example, Belmondo and Sargis-Roussel (2015:92) presents Humphrey's SWOT analysis (strengths, weaknesses, opportunities and threats) as a prominent, traditional strategy tool:

- This tool involves *actions* such as listing and prioritising elements within each domain,
- *Interconnected concepts* (strengths and weaknesses that relate to organisational resources and capabilities, opportunities and threats that are presented by the external environment within which the organisation operates),
- *Intention* (the application of synthesis in order to analyse input and subsequently generate recommendations), and
- *Mode of representation*, in that the traditional SWOT tool is almost always represented by a four-box matrix (Belmondo and Sargis-Roussel, 2015:92) positioned over the

internal-external axis and the helpful-harmful axis, as depicted in Figure 5.1 below, adapted from Harrison (2010:93).

Figure 5.1: A simplified SWOT matrix



Source: Adapted from Harrison (2010:93)

5.5.2 Strategy tools in the practice of strategy

The study of strategy tools falls directly into the scope of scholars advocating for building new insights into both methodology and tool deployment during strategising as the actions and interactions of strategists are foregrounded in strategy as practice (Johnson *et al.*, 2003 in Jarratt & Stiles, 2010:29). Empirical evidence emphasises the widespread adoption of strategy tools and their extensive use for strategy in businesses (Moisander & Stenfors, 2009:228; Rigby, 2001 in Knott, 2006:1090). The teaching of popular strategy tools is also a key component in the contemporary Master of Business Administration (MBA) teaching and other strategy texts (Johnson *et al.*, 2004 in Knott, 2006:1090). Not only are they introduced into the practice through teaching in business schools, but also through strategy consultants, business articles and press and other strategy literature (Sahlin-Andersson & Engwall, 2002 in Moisander & Stenfors, 2009:228). Strategy tools are very often based only

on academic research, providing the opportunity to implement explicit theory into actual strategy practice (Moisander & Stenfors, 2009:228). The practice perspective is more concerned with the tacit knowledge of how strategy tools work as opposed to the traditional view on the academically inclined explicit knowledge of strategy tools and making strategy (Jarratt & Stiles, 2010:29; Knott, 2006:1091). Therefore, adopting a practice perspective on the use of strategy tools, enables scholars to focus on how tools are used in practice to create a common language for strategising and how it can offer fields for the negotiation of strategic interests (Jarzabkowski & Kaplan, 2015:541). A practice view provides an understanding of how the practices of strategists are mediated by particular strategy tools and how strategy tools shape, and are being shaped during the strategy making process (Paroutis *et al.*, 2015:49), as little is still known about how strategy tools and other material artefacts shape strategising (Vaara & Whittington, 2012). This is due to a lack of appropriate theoretical frameworks within which the use of strategy tools can be conceptualised during the strategy process (Jarzabkowski *et al.*, 2013:43). Miller and Ireland (2005 in Moisander & Stenfors, 2009:228) also argue that several studies have shown that strategy tools continue to be underutilised or misvalued by strategists. Therefore, seminal strategy as practice scholars such as Whittington (2004) call for an enhanced understanding of how strategy technologies (e.g. strategy tools, frameworks and concepts) are continuously developed and particularly *how* these are used within practice (Wright *et al.*, 2013:95).

It is widely argued that organisational strategists need the correct strategy tools and skills in order to perform strategising work (Gunn & Williams, 2007; Wright *et al.*, 2013:95). Although strategists might not always understand or even acknowledge the theoretical underpinnings of strategy tools, they are essentially empirical devices that were designed to guide strategists and inform strategic thinking (Pelz, 1978 in Wright *et al.*, 2013:96). Strategy tools have the potential to influence the practices of strategists even though they are scarcely featured in conventional strategy literature (Knott, 2006:1090). Not only do strategy tools from a classic perspective structure and guide activity throughout the strategising process (Knott, 2006:1091), but they also enable strategists to make sense of the context within which strategising takes place, ultimately transforming what is ambiguous and uncertain into more concrete certainty and therefore demonstrate how they are able to make strategy as strategists (Jarzabkowski & Kaplan, 2015:541). Adopting a practice perspective opens a more extensive agenda to study the micro and macro outcomes of strategy tools, from the

individual using strategy tools, to the organisational-level strategic change and even the institutionalisation of these strategy tools (Jarzabkowski & Kaplan, 2015:542).

Another advantage of adopting the strategy as practice perspective in understanding strategy tools, is in examining the meaning of strategy tools to the different types of strategists who draw upon them in their praxis (Jarzabkowski & Kaplan, 2015). For instance, Balogun and Johnson (2004) argue that middle managers perceive strategy tools as a method to engage within strategic discourse across divisions in the organisation or to influence in an upwards manner, whilst Grant (2003) as well as Mantere and Vaara (2008) argue that senior managers regard strategy tools as objects that convey strategic information and present the positive image of strategy. External to the organisation, strategy consultants display their status and expertise in the consulting field through adopting and employing strategy tools within organisations (McKenna, 2006). The returns of using strategy tools are also important in that strategists may accrue value from their use, such as gaining support for strategic decisions (Kaplan, 2008), resolving political differences (Pettigrew, 1977) and demonstrating competence in strategising (Mantere and Vaara, 2008 in Jarzabkowski & Kaplan, 2015:541).

Adopting a practice perspective opens new avenues through which the use of strategy tools can be examined and interpreted. Applying a practice perspective implicitly assumes that strategy tools are part of the material artefacts¹¹ of strategising that represent the actual strategy work and are part of the dynamism of strategising. As practice theorist, Schatzki (2006) further emphasises this role of artefacts as it forms part of a bundle of practices that embodies a social phenomenon, such as the phenomenon of organisation (Jarzabkowski *et al.*, 2013:43). Reckwitz (2002) further argues that these artefacts are not simply in practice for innate purpose, but they are situated (and gain only purpose) in line with the context in which they are being used (Jarzabkowski, 2005 in Jarzabkowski *et al.*, 2013:43). Artefacts are fully part in the performance of a practice as it is constrained by actions and knowledge, and simultaneously can constrain actions and knowledge (Engeström & Blackler, 2005; Reckwitz, 2002 in Belmondo & Sargis-Roussel, 2015:92). When strategists use strategy

¹¹ Material artefacts are the embedded “things” or “stuff” that form part of the doing of strategy, such as the use of spreadsheets, PowerPoint presentations, whiteboards and other material objects (Jarzabkowski *et al.*, 2013:41).

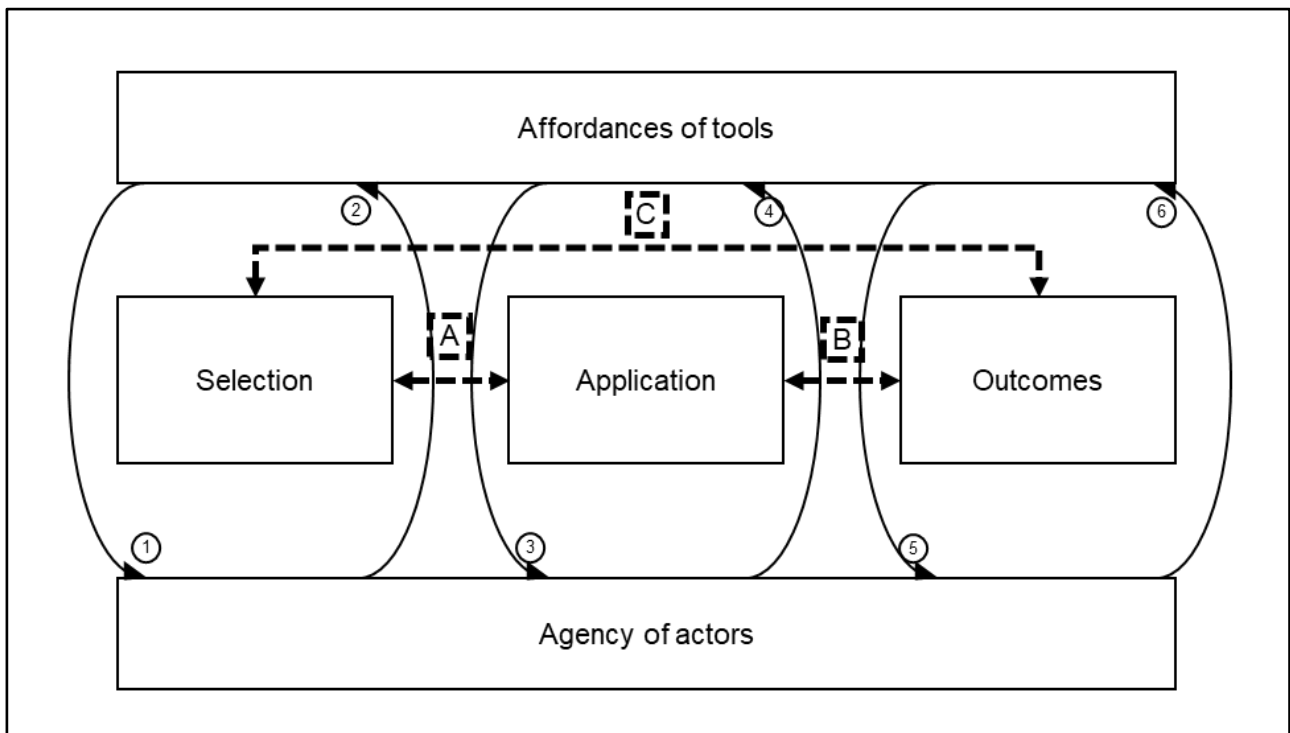
tools, they are essentially creating “things” that can carry meaning and intention (Belmondo & Sargis-Roussel, 2015:92). An example of this by hand of the SWOT matrix (depicted in Figure 5.1) is when a strategist employs the SWOT matrix, the strategist will use perhaps a computer or pencil to create consecutive drafts (Giraudeau, 2008 in Belmondo & Sargis-Roussel, 2015:93), which represents how the SWOT matrix is being filled with knowledge (Belmondo & Sargis-Roussel, 2015:93). Therefore, the SWOT matrix codifies this knowledge about strategising in the way that it is visually represented or propositioned. This embeddedness of certain content and the implicit guidance of how a strategist should think has various implications in the practice of strategy (Worren, Moore & Elliott, 2002 in Jarzabkowski & Kaplan, 2015:538). By offering a structured way of thinking, March (2006) defines strategy tools as “technologies of rationality” in the sense that they offer mostly causal structures, capture specific data and establish the decision-making rules for including data and selecting among alternatives (Jarzabkowski & Kaplan, 2015:538). In this process of rational strategy-making, Simon (1978:9) identifies “procedural rationality” to explain how strategists make supposedly rational choices given the limits of their cognitive abilities (Cabantous & Gond, 2011). Originally, this procedural rationality in tools intended to provide support for strategists in coping with uncertainties and complexities associated with the strategy process. March (2006:203), however, warns against this “procedural rationality” in ambiguous, complex situations: if strategy tools are oversimplifying and misrepresenting data incorporated in these tools, it could lead to major errors in strategic decision-making (Jarzabkowski & Kaplan, 2015:538). Oversimplification can lead to choosing incorrect information and overlooking variables that might be important, leading to distortion, deviance and even failure in strategising (Jarzabkowski & Kaplan, 2015:538). The strategy as practice perspective offers an alternative view for the classic idea of rationality in using strategy tools. A framework for understanding the use of strategy tools in practice and the role of rationality (Jarzabkowski & Kaplan, 2015) is subsequently introduced and explained, after which several other theoretical perspectives on understanding the use of strategy tools are introduced and discussed in light of the study’s research objective.

5.5.2.1 Strategy tools as technologies of rationality

Stemming from the argument around the Western-developed concept of individual- or organisational-level rationality, Jarzabkowski and Kaplan (2015) uses a practice lens in developing a framework (below in Figure 5.2) to understand how strategy tools are actually

used in practice. They argue that the traditional argument around the problematic dichotomy of correct or incorrect use of strategy tools potentially obscures the various strategic outcomes that might evolve from the use of strategy tools, in a sense that it diverts focus away from the dynamics in using strategy tools as “technologies of rationality” (Jarzabkowski & Kaplan, 2015:538). A practice perspective portrays strategy tools used as “fluid objects” that can produce various outcomes for different stakeholders in the strategising process through diverse selection and application by various strategists. Enabling and constraining various strategic outcomes are ascribed to the “degree of exploration provoked, resolution achieved satisfaction with the process, discretion or competence of the actor, and routinisation of the tool in an organisation’s practice” (Jarzabkowski & Kaplan, 2015:538).

Figure 5.2: A framework for understanding strategy tools-in-use



Source: Jarzabkowski and Kaplan (2015:539)

Adopting the view of technologies-in-use, strategy as practice implies that strategy tools have embedded affordances that can constrain or enable their use (Orlikowski & Scott, 2008 in Jarzabkowski & Kaplan, 2015:538). In explaining the term “affordances”, Zammuto, Griffith, Majchrzak, Dougherty and Faraj (2007:752) mention “The materiality of an object favours, shapes or invites, and at the same time constrains, a set of specific uses”. The use of a strategy tools is not only dependent on the design of the tool, but also its context and

the strategists' interpretation in the way they might use this tool in unconventional and creative ways (Jarzabkowski & Pinch, 2014 in Jarzabkowski & Kaplan, 2015:538). The material and conceptual affordances of strategy tools suggest that they are not necessarily neutral as it creates an argument where certain knowledge could be privileged for strategic decision-making (Jarzabkowski & Kaplan, 2015:538). Furthermore, conceptualising tool use from a practice perspective, necessitates foregrounding the strategists that use them Jarzabkowski & Kaplan, 2015:541). As alternative to the classic view of rationality, the practice perspective suggests that strategists rather seek to conform to a more normative idea of rationality (Cabantous & Gond, 2011 in Jarzabkowski & Kaplan, 2015:541). Drawing upon strategy tools in the strategising process may create a feeling of rationality (Pondy, 1983 in Jarzabkowski & Kaplan, 2015:541) or convey an appearance of rationality to other strategists or stakeholders (Feldman & March, 1981 in Jarzabkowski & Kaplan, 2015:541). Therefore, this alternative view recognises that strategy tools function as technologies of intended rationality, rather than pure rationality (Cabantous & Gond, 2011:577). Furthermore, the use of a strategy tool by a strategist implies that the strategist could conform to certain norms of strategy making (Knights & Morgan, 1991 in Jarzabkowski & Kaplan, 2015:541) and derive various purposes in using strategy tools, depending on the level and position of the strategist (Jarzabkowski & Kaplan, 2015:541). Jarzabkowski and Kaplan (2015) sets out to explain the interaction between the affordances of tools and the agency of strategists in the conceptualisation of strategy tools in use, portrayed in Table 5.1 below (with reference to Figure 5.2).

Table 5.1: Understanding strategy tools-in-use

	Selection	Application	Outcomes
Affordances of tools	There is no one right tool for each situation. The affordances of the tools as well as the bounded rationality and constrained agency of the actors who want to use them shape which tools are selected.	Tools are applied improvisationally by organisational actors, both to interpret the strategic context and pursue preferences and interests.	Outcomes of tool use extend beyond the achievement of a strategic decision in an individual project, to individual, group, organisational, and field level considerations.
The interpretive flexibility of a tool is what makes it useful. Its affordances constrain and enable action and outcomes.	Arrow 1 1.1. The selection of tools may be more dependent on organizationally standardized use than on the "fit" of the	Arrow 3 3.1. Tools provide a common language for strategic conversations between managers across hierarchical,	Arrow 5 The "success" of the use of a tool at the organizational level can be measured by the degree to which:

	Selection	Application	Outcomes
	tool with the situation in the environment.	functional, and geographic boundaries.	5.1. It is adopted and routinized in organizational practice.
	1.2. The selection of tools may be influenced by the degree to which they are simple and offer clear visual representations, where simpler tools are easier to remember and use.	3.2. Tools create a space for social interactions about strategy at which actors can negotiate their different interests	The “success” of the use of a tool at the field level can be measured by the degree to which: 5.2. It diffuses and is widely adopted in management education.
	1.3. The selection of quantitative tools is attractive to users because numbers can signal rationality, but this attractiveness is offset by potentially greater difficulty in using the tool.	3.3. The content and structure of the tool channel potential improvisations as the tool is used.	5.3. It diffuses and is widely adopted by managers in organizations.
Agency of actors			
	Arrow 2	Arrow 4	Arrow 6
Actors select and use tools to cope with uncertainty in the environment, though this process may not be “rational” in the classical sense	2.1. Actors may select tools based on satisficing. They pick the first tool that they know how to use (or are familiar with) that seems to fit the problem at hand.	4.1. Actors use tools as interpretive devices that enable them to focus attention on and make sense of strategic issues for themselves and for others.	The “success” of the use of the tool for actors can be measured by the degree to which: 6.1. Its use provokes new explorations.
	2.2. Actors have relative freedom to select a tool, depending on their position in the hierarchy (formal power).	4.2. Actors find it useful to marshal tools to legitimate particular positions or viewpoints	6.2. It enables interim decisions that allow a project or organization to move forward.
	2.3. Actors have relative freedom to select a tool depending on their competence in its use (expertise power).	4.3. As actors work with tools, they adapt them to fit the needs at hand.	6.3. Their “client” is satisfied with the outcome of the project (internal client or consulting client).
			6.4. They demonstrate competence. 6.5. Users achieve their personal objectives (legitimacy of position or ratification of a particular strategic choice). 6.6. Differences across actors are surfaced and resolved.

Source: Jarzabkowski and Kaplan (2015:540)

5.5.2.2 Strategy tools as boundary objects

The traditional strategy literature assumes that strategy tools are essentially used by strategists during problem-solving and decision-making processes (March, 2006 in Spee & Jarzabkowski, 2009:224). However, empirical studies have since indicated that the use of strategy tools are not solely for instrumental purposes, but that they are rather adapted to the peculiarities of their use (Spee & Jarzabkowski, 2009:224). This suggests a flexible nature of strategy tools in that they can be adapted to complete various strategic tasks (Frost, 2003 in Spee & Jarzabkowski, 2009:224; Jarzabkowski & Kaplan, 2015), influenced by the political and social dynamics of the strategists who use them and also by their design features. As an example, Chesley and Wenger (1999) have shown that the Balanced Scorecard as popular strategy tool have been used rather for conversational than analytic purposes (Spee & Jarzabkowski, 2009:224). Others such as Hill and Westbrook (1997) have also illustrated how strategy tools such as the SWOT matrix in this instance, have been adopted for use during strategic discussions, without the analysis thereof necessarily being incorporated into subsequent actions or discussions (Spee & Jarzabkowski, 2009:224). Hodgkinson *et al.* (2006) refers here to the use of strategy tools for socio-political purpose, in that strategy tools could be used by top managers or other influential strategists to stimulate and steer strategy discussions during praxis such as strategy workshops (Spee & Jarzabkowski, 2009:225).

In an attempt to explain the different roles of objects such as strategy tools in the strategising process, Nicolini, Mengis and Swan (2012) presents four complementary theories to explain how strategy objects could change according to the centrality of negotiation processes (Belmondo & Sargis-Roussel, 2015:S93). They distinguish between boundary, epistemic, activity and infrastructure objects:

- Boundary objects (the focus of this section) enable interaction and collaboration across various users through their recognisability across boundaries,
- Epistemic objects embody collective activities to produce new knowledge,
- Activity objects serve as conceptual spaces where strategists negotiate the objective through the interplay of various skills and tools, and
- Infrastructure objects are the embedded parts of practices that represents past learning and accepted knowledge, and are generally officialised and disseminated over collectives (Nicolini *et al.*, 2012 in Belmondo & Sargis-Roussel, 2015:S93).

In their use between different strategists and stakeholders for various purposes, strategy tools may also serve as tools used for interaction across several organisational boundaries, for example between middle and senior management (Mantere, 2005) and different organisational levels (Ketokivi & Castañer, 2004) such as the corporate and business level units (Spee & Jarzabkowski, 2009:224). In order to understand why and how strategy tools are used in this type of interaction, Spee and Jarzabkowski (2009:224) argue for the adoption of a boundary objects framework. With reference to Table 5.3 in which Jarzabkowski and Kaplan (2015) illustrate the common language that tools provide to enable strategic conversations, the boundary object perspective implies that this language does not always indicate shared meaning (Spee & Jarzabkowski, 2009:225). In fact, strategy tools may hinder shared meanings across organisational levels (Grant, 2003 in Spee & Jarzabkowski, 2009:225), complicating the share of strategic information between levels of management due to the way different levels use and structure this information (Spee & Jarzabkowski, 2009:225). A politicised use of a strategy tool may occur where a powerful stakeholder uses a particular strategy tool to shape outcomes that legitimises their own interests (Hill & Westbrook, 1997 in Spee & Jarzabkowski, 2009:225). Such an example includes Hodgkinson and Wright's (2002) study of how a Chief Executive Officer (CEO) influenced the use of scenario planning tools to prioritise certain scenarios among a team of senior managers (Spee & Jarzabkowski, 2009:225). This role of power dynamics through the use of tools in strategising is an important area for further study in the practice domain (Spee & Jarzabkowski, 2009:225).

In conceptualising strategy tools as boundary objects that enable as well as constrain knowledge sharing between and across different levels and boundaries, Carlile (2004) identified three types of knowledge boundaries (Spee & Jarzabkowski, 2009:226):

- *Syntactic* boundaries are knowledge boundaries in its simplest form, assuming that knowledge can be transferred between parties, as long as a common syntax is present.
- *Semantic* boundaries are often more complex. To transfer knowledge between semantic boundaries, common meanings must first be developed in order for parties to interpret the requirements of the opposing party.
- *Pragmatic* boundaries are the most complex. They often exist in social and political form; therefore, common interests must first be developed to translate knowledge over a

pragmatic boundary. These boundaries often exist where business units may have different political interests in pursuing a corporate strategy (Jarzabkowski & Kaplan, 2008 in Spee & Jarzabkowski, 2009:226).

Conceptualised as boundary objects, strategy tools can essentially assist in transferring, translating and transforming certain knowledge across the various knowledge boundaries as presented by Carlile (2004 in Spee & Jarzabkowski, 2009:226). However, Star and Griesemer (1989) argue that not all strategy artefacts can act as boundary objects, but only become boundary objects when they are incorporated into the practices of strategists in a meaningful and useful fashion (Spee & Jarzabkowski, 2009:227). As boundary objects, strategy tools are also assumed to have unique identity, therefore having a symbolic structure to make them recognisable across various fields and units (Star & Griesemer, 1989:393). Boundary objects can also be conceptually categorised as either designated boundary objects or boundary objects-in-use as proposed by Levina and Vaast (2005). Designated boundary objects are those artefacts that are selected specifically for boundary spanning knowledge transfer, whereas boundary objects-in-use refer to those designated boundary artefacts that are used in practice between different groups and acquire a common identity over various workgroups (Spee & Jarzabkowski, 2009:227). Lastly, strategy tools can theoretically be conceptualised as boundary objects as they satisfy the characteristics of boundary objects in that they:

- Are not necessarily applied instrumentally,
- May be flexibly interpreted, and
- Are shaped by political and social influences in their context of use (Spee & Jarzabkowski, 2009:227).

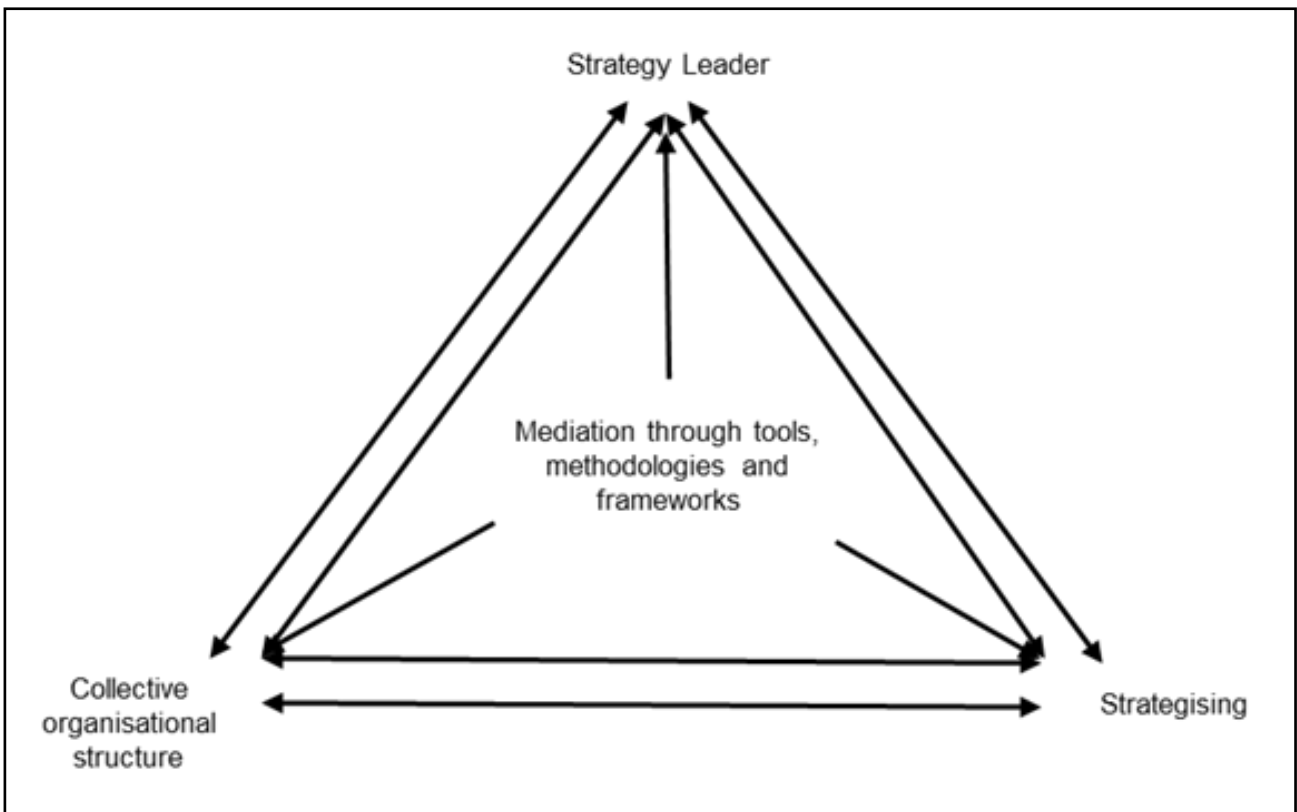
Strategy tools enable the integration and diffusion of information within an organisation, mostly during the share of strategic information within communicative episodes, for instance during negotiation or discussions within a strategy workshop (Hodgkinson *et al.*, 2006 in Spee & Jarzabkowski, 2009:228). Empirical evidence (e.g. Clark 1997; Stenfors *et al.*, 2004) has since illustrated that strategists prefer simple and transparent tools and that design properties remains an important element when strategists select and employ strategy tools (Spee & Jarzabkowski, 2009:225).

5.5.2.3 Strategy tools as activity

In exploring the way in which senior executives engage with various strategy tools and methodologies in developing competitive strategy, Jarrat and Stiles (2010) use an activity theory framework to capture insights into the strategising process. Adopting an activity theory perspective fits strategy as practice particularly well, as Jarzabkowski (2011:130) illustrates how tools and methodologies mediate activity between strategists and their communities. Jarrat and Stiles argue that activity theory allows scholars to investigate how strategising is framing, and being framed by the perceptions, views and cognitive models of executives within the organisational setting. In adopting this practice perspective, they are able to understand the contribution of these methodologies in context through studying variation (Jarrat & Stiles, 2010:29). Their findings substantiated the argument that no strategic model can provide “pure” strategic solutions within practice, but rather, tools and methodologies are adapted to fit their context (Jarrat & Stiles, 2010:30). Their adapted activity framework is displayed below in Figure 5.3.

In adopting the activity theory framework from Vygotsky (1978) and Leontiev (1978), Jarrat and Stiles generated three activity frameworks that explain the role of strategy in the strategising episodes of senior management, namely routinised practice, reflective practice and imposed practice. They illustrated how different managers’ perspectives on strategy, their understanding of the organisational environment and their confidence in certain strategy tools generated knowledge that was relevant for their specific operational context (Jarratt & Stiles, 2010:37). However, they were also able to illustrate that the use of traditional strategy tools was often viewed as a helpful framework for the collecting and examining of strategic knowledge, and that senior leaders often engage with multiple methodologies during strategising (Jarratt & Stiles, 2010:40).

Figure 5.3: An activity theory framework for strategy tool use



Source: Jarratt and Stiles (2010:31)

5.5.2.4 Epistemic cultures and strategy tools

Another theoretical approach to studying strategy tools is by adopting an epistemic culture perspective. Simply explained as the cultures of knowledge production, Knorr-Cetina (1999:1) defines epistemic cultures as the set of “arrangements and mechanism... which, in a given field, make up how we know what we know”. The notion of epistemic culture differs from the traditional definition of culture as norms or values in three distinct ways: it comprises of daily practices, the practices are related to particular fields, and these practices generate and certify knowledge. Rooted in scientific laboratory studies (Latour & Woolgar, 1979), epistemic cultures examine the interactions between individuals and the artefacts they use to produce and consume knowledge. An epistemic culture lens is particularly useful in studying strategy tools as it centralises the relationship of the strategist with the tools that are being used. As material artefacts, strategy tools are part mediators of practice in that they are used, among other “things”, to constitute the practice of strategising (Kaplan, 2011:323). Strategy tools as part of epistemic “machinery” differs from the traditional notion

of culture in that cultural artefacts are conceived to be only represented at surface-level of the given culture (Schein, 1990 in Kaplan, 2011:323).

Through an empirical case study, Moisander and Stenfors (2009) compare the epistemic cultures between academics as strategy tool developers and managers from a contemporary organisation as strategy tool users (Moisander & Stenfors, 2009:229). They develop an interpretative framework, drawing upon sociological theory of technology from Suchman (1994) as well as a cultural approach to organisational research from Alvesson (2004, in Moisander & Stenfors, 2009:229). In viewing strategy tools as cultural artefacts as well as technologies in producing organisational knowledge, they were able to identify diverse forms of epistemic cultures. Knorr-Cetina (1999) argued that it is important to focus on epistemic culture that practitioners draw upon not only when designing, but also when using strategy tools (Moisander & Stenfors, 2009:229).

In understanding different epistemic cultures, scholars are provided with different perspectives on the production and warrant of knowledge and therefore presented with different ideas in how strategy tools are to be used. Understanding epistemic culture will allow for improvement in the practical relevance of strategy tools (Moisander & Stenfors, 2009:228). The traditional strategic management epistemic culture is rather “modernist” in that it values “scientific detachment over practical engagement, the general over the contextual, and the quantitative over the qualitative” (McKiernan & Carter, 2004:62 in Moisander & Stenfors, 2009:228). Critiques of the modernist view have argued that a modernist view lacks severe practical pertinence for organisational practitioners (McKiernan & Carter, 2004; Whittington, 2004 in Moisander & Stenfors, 2009:229). There have been numerous calls for the academic theory to be reconciled with managerial activity (Aram & Salipante, 2003; Pettigrew, 2001 in Moisander & Stenfors, 2009:228), a call that fits the strategy as practice research agenda particularly well.

In another empirical ethnography study examining the use of PowerPoint in strategising, Kaplan (2011) show how PowerPoint’s affordances as strategy tool enabled collaboration and shared meaning in an ambiguous strategic environment, stimulating discussion, enabling re-combinations, adjusting ideas and providing access to a wide audience of organisational practitioners (Kaplan, 2011:320). By adopting an epistemic culture lens in

studying the use of PowerPoint as technology, Kaplan is able to explain how strategists mobilise PowerPoint within their discursive practices (Kaplan, 2011:323). Kaplan is not only able to describe the epistemic culture, but also presents insights into how the culture operates. Kaplan's findings illustrate how PowerPoint exists as enacted rather than being a static artefact (Kaplan, 2011:342).

5.5.2.5 Visual theory and strategy tools

In line with the developments in strategy as practice and its concern with the way in which strategists engage with their materials during strategising, the use of visual studies can illuminate the visual aspects of interaction between strategists and their strategy tools (Paroutis *et al.*, 2015:S48). Stemming from the social sciences and humanities, visual studies focus on the embodied interactions that can be isolated in a visual format during the process of strategising. Visual studies can take a variety of forms, such as architecture, picture or pages and consist of several sub-disciplines such as accounting, marketing and tourism (Bell & Davidson, 2013 in Paroutis *et al.*, 2015:S49).

With a current limited empirical and theoretical understanding of the type of processes that take place during strategising as strategists visually interact with strategy tools, visual studies may assist to explain how strategy tools are created and used in order to produce strategic knowledge during strategic episodes. As a particularly useful mechanism in linking visual studies with developments in strategy as practice, Meyer, Höllerer, Jancsary and van Leeuwen (2013:505) identified five typical approaches to studying visuals: archaeological, practice, strategic, dialogical and documenting. The practice approach in studying visuals assists strategy as practice to develop a practice-based orientation towards visuals in describing them as "socially meaningful material objects that are created, employed and manipulated in organisational contexts, making them a constitutive part of social practices (Meyer *et al.*, 2013:505). In a study on how consultants interacted with visual tools during strategy workshops, Paroutis *et al.* (2015) provided a conceptual representation of how interactions with strategy tools can be grouped into three unique patterns, namely *shift*, *inertia* and *assembly* (Paroutis *et al.*, 2015:S49). They further studied the way in which the affordances of strategy tools can be linked to each of these patterns in practice (Paroutis *et al.*, 2015:S48), ultimately leading to cognitive change and the negotiation of specific meaning among strategists (Paroutis *et al.*, 2015:S62).

In another ethnographic study that draws upon visual studies, Knight, Paroutis and Heracleous (2018) discovered that strategists are prone to using three visual mechanisms (*depiction, juxtaposition* and *salience*) to create slides on PowerPoint. These PowerPoint slides – through the visual mechanisms – stimulate conversation and enable meaning-making, resulting in *strategic visibility* (Knight *et al.*, 2018:894). Knight *et al.* (2018) argue their adoption of visual studies as particularly applicable to strategy in line with Mintzberg (1994:240), arguing that strategy consists of rather abstract concepts as opposed to something tangible (Knight *et al.*, 2018:895). Their study fulfils the strategy as practice research agenda in the area of visuals as a particular type of material, an area that remains largely underexplored. The notion of *visuality* in strategising is important, as visual materials possess unique physical properties that can enable strategists to convey meaning that might not be possible in other modes of communication (Paroutis *et al.*, 2015 in Knight *et al.*, 2018:895).

Visual studies are advantageous to studying strategy as practice in a few ways. Firstly, visual studies can make explicit the mechanisms that cause shift in the direction that strategising takes when strategists draw upon visual materials (Knight *et al.*, 2018:895). In a broader organisational setting, visual images allow strategists not only to replicate what is embodied in text through visuals, but they can also contradict text and discourse to create what Newitt and Oyama term “generative tensions” (2001:55). Shifting the focus to external strategists, the use of PowerPoint remains an important element in the work of strategy consultants in addition to conversations with clients. PowerPoint is different from discourse and other activities and presents a different analytical perspective as it involves a deliberate production and modification of materials and their visual aspects (Knight *et al.*, 2018:895).

5.5.2.6 Strategy tools, strategy objects and strategy infrastructure

In a study that explored how insurance managers adapted strategy tools in local contexts, Belmondo and Sargis-Roussel (2015) conceptualised how strategy tools shape strategy infrastructure through three aspects, namely language, meaning and intention. By adopting a practice perspective aligned with the theoretical orientations of Schatzki (2009:21) who argues that practices are the “source and carrier of meaning, language and normativity”, they closely relate the aspects of language, meaning and intention to the use of strategy

tools (Belmondo & Sargis-Roussel, 2015:92). They firstly describe the various roles of strategy objects in strategising by hand of Nicolini *et al.*'s (2012) complementary theories of boundary objects, epistemic objects, activity objects and infrastructure objects and subsequently relate the interacting aspects of language, meaning and intention to the use of strategy tools in practice. Belmondo and Sargis-Roussel then argue that the use of a strategy tool entails the process of negotiation about languages, meanings and intentions in order to render the strategy object explicit. They introduce the concept of *strategy infrastructure* as the product of the final strategy object in that it embodies a collective agreement through the common aspects of negotiation (2015:95). The strategy infrastructure is made official when sufficient agreement exists that the strategy infrastructure can satisfy the needs of a client and that the collective has consensus on the way forward (Belmondo & Sargis-Roussel, 2015:95). Strategy infrastructure differs from boundary, epistemic and activity objects as it incorporates the collective agreement (rather than individual selection) on both meaning and intention and embodies a symbolic representation of strategic knowledge (Belmondo & Sargis-Roussel, 2015:95).

Strategy tools can generally be used in various contexts due to its abstract and decontextualised nature (Spee & Jarzabkowski, 2009 in Belmondo & Sargis-Roussel, 2015:96). Its use, however, demands an adaptive process that is enabled through provisional strategy objects. Synthesising language, meaning and intention across strategy tools, strategy objects and strategy infrastructure, Belmondo and Sargis-Roussel offer a glimpse into how strategy objects mediate the transition between strategy tools and strategy infrastructure as illustrated below in Table 5.2.

Table 5.2: From strategy tool to strategy infrastructure

	Strategy tool	Strategy objects	Strategy infrastructure
Language	Modes of knowledge representation and labelling	Physical appearance Combination of signs and symbols inscribed on a physical medium	Accepted physical form representing strategy knowledge
Meaning	Conceptual knowledge (strategy concepts' definition and relationships)	Users' factual and conceptual strategy knowledge	Accepted collective strategy knowledge
Intention	Premises about firms and strategy processes	Users' idiosyncratic perceptions of how the organisation should operate	Situated agreement on how, why and when the strategy infrastructure

	Strategy tool	Strategy objects	Strategy infrastructure
	Assumptions about reasons and contexts for use	Rationale for use (including individual agenda)	should be used in subsequent strategising

Source: Belmondo and Sargis-Roussel (2015:96).

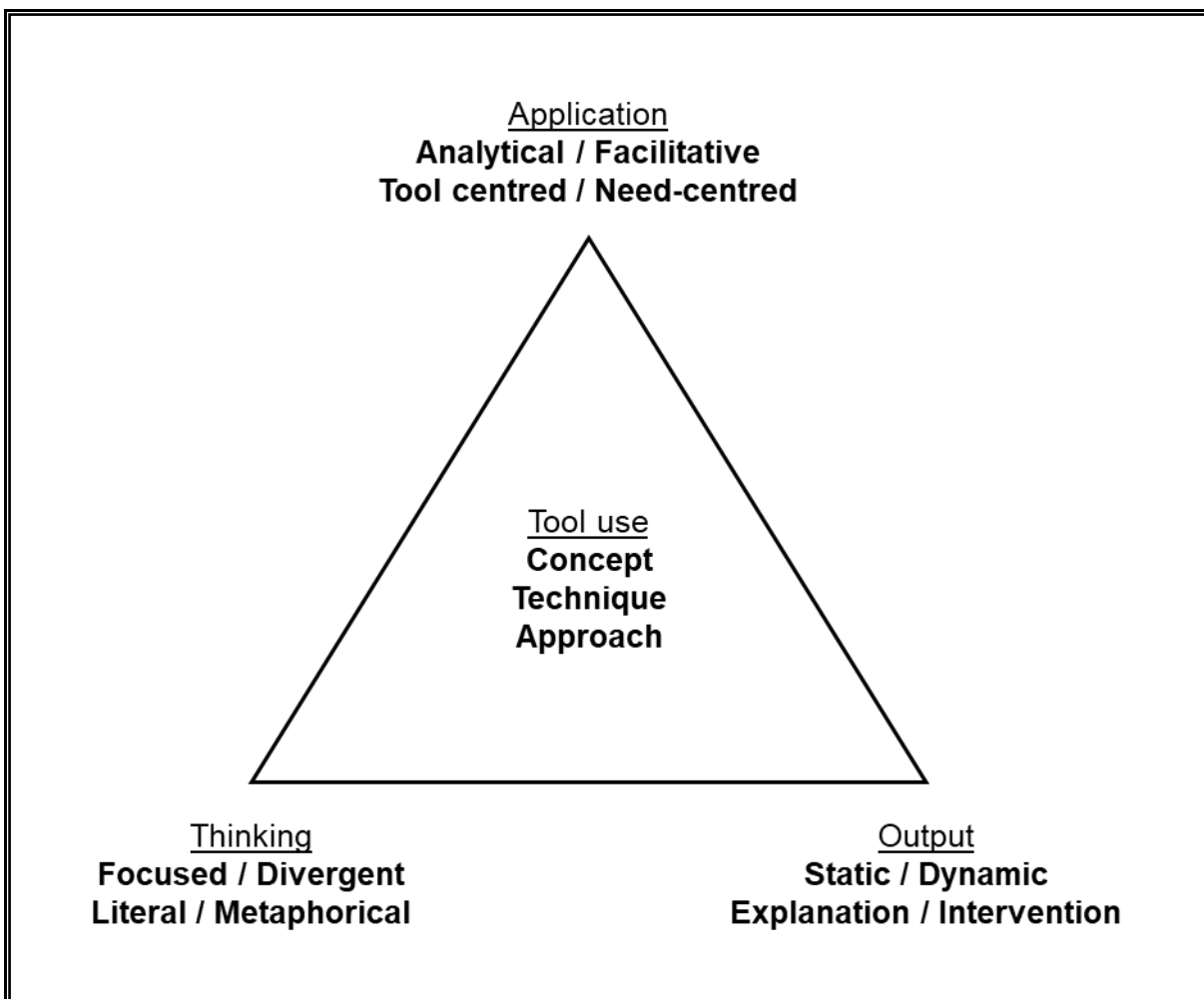
5.5.2.7 Typologies of strategy tools

Adopting a strategy as practice perspective, Knott (2006) developed a useful typology for strategy tools in use. Not only are strategy tools espoused in the strategy as practice literature that foregrounds practitioners, but its use in practice is continuously observed empirically (Knott, 2006:1090). Strategy tools are not necessarily used as substitute for the experience or capabilities of the strategist (Whittington, 2006), but is rather drawn upon to assist in the strategist's craft of strategy through an uncertain, ambiguous and complex strategic environment (Johnson *et al.*, 2004 in Knott, 2006:1091). Since strategy tools are used by strategists, it is prone to possible dysfunction and inherent bias (Knott, 2006:1091). Strategy tools have the potential to structure and constrain the strategist's thinking as it guides the strategist through the strategising process.

Mintzberg, Ahlstrand and Lampel (1998) highlighted the ability of a strategy tool that is used to structure information, potentially could influence decision-making and insights that arise from the strategic information at hand. Mintzberg *et al.* (2008) also described how strategists build cognitive frames and models that influence the strategy that emerges from their work. Worren, Moore and Elliott (2002) argued that the use of strategy tools could influence these cognitive frames and models, subsequently prioritising certain strategic information over others (Knott, 2006:1091). In an empirical study on this framing issue, Armstrong and Brodie (1994) examined the strategic outcomes of managers in a consulting firm at hand of how issues were framed differently (Knott, 2006:1092). Acknowledging that almost any strategy tool application could be susceptible to this framing effect, Knott argues for tools to be made more constructive by acknowledging the necessity for adaptation and interpretation (2006:1092). This need for adaptation by the tool user should not only be considered by hand of the features or characteristics of the tool, but it should also incorporate the diversity of the organisational context (Knott, 2006:1092). In an attempt to incorporate Rigby's (2003) suggestion that the way in which a strategy tool is used in practice is just as important as the ability to appropriately choose and apply strategy tools, Knott (2006) sets out to develop

a typology of strategy tools based on various typologies that were derived both conceptually and empirically, such as Porter's (1980) typology for competitive strategy. Its relevance for strategy as practice is incorporated through adapting the empirical component from popular MBA teaching of strategy (Knott, 2006:1093). The dimensions of Knott's typology represent the characteristics and diversity of functions that are involved in using strategy tools and are illustrated in Figure 5.3 below.

Figure 5.4: Typology of strategy tools



Source: Knott (2006:1094)

The conceptual and empirical dimensions of Knott's (2006) strategy tool typology is listed and briefly defined in Table 5.3 below.

Table 5.3: Dimensions of tool application

Dimension / Modes	Explanation
Tool	Classification of form and scope of the tool as applied
Concept	Perspective or idea providing a way of thinking. Not closely defined.
Technique	Specific and limited in scope. Multiple tools may easily be used.
Approach	Interconnected ideas forming an over-arching method of approaching a problem.
Application	Process characteristics of the activity of applying the tool
Analytical	Deals with parts and inter-relations of a subject, generating specific output.
Facilitative	Benefit is gained from the thought, interaction and debate stimulated by the use of the tool.
Tool-centred	Choice and interpretation of information follows tool-derived categories.
Need-centred	Substantial customising is undertaken by users to match situation needs.
Thinking	Cognitive characteristics of the activity of applying the tool
Focused	Well-defined, and specific to a given type of information and problem aspect and viewpoint.
Divergent	Involves expansive, creative, out-of-box thinking.
Literal	Deals directly and explicitly with the issues relating to the business situation.
Metaphorical	Presents different subject matter to inspire fresh thinking about the business situation.
Output	Characteristics of the output from tool application
Static	Reflects a situation at a snapshot in time.
Dynamic	Reflects the evolution of forces influencing a situation over a period of time.
Explanation	Structured information that can be used as the basis for a course of action.
Intervention	Changes to people, resources, organisation or strategy.

Source: Knott (2006:1095)

5.5.2.8 Other research on strategy tools

Most of the current strategy as practice literature on strategy tools remain largely theoretical with less empirical study within this domain (Qehaja, Kutllovci & Pula, 2017:75). For empirical contributions, these have also been conducted mostly within specific contexts, such as for-profit organisations in developed countries, with only a few in the context of developing countries such as South Africa (Elbanna, 2009 in Qehaja *et al.*, 2017:75). Frost (2003) offers insight into the type of strategy tools that are employed in practice, whilst Rigby and Bilodeau (2011) analysed the popularity of strategy tools among strategy practitioners. Roper and Hodari (2015) set out to examine the contextual influences on strategy practitioner's use or rejection of strategy tools whilst Vaara, Sorsa and Pälli (2010) intensely studied the use of documents and Microsoft's PowerPoint by strategy practitioners. Stenfors (2007) provides an overview of the general use of analytical models and frameworks in

strategy. Some of the other theoretical work include the performative nature of strategy tools that afford strategists the performance of strategy (Cabantous *et al.*, 2011) and the entanglement between strategists as human actors and material objects (Leonardi, 2011).

Jarzabkowski (2012) advocates for a few ways in which practice scholars can explore strategy tools to deepen the understanding of strategy tools in strategising. This inquiry can occur in many ways, such as counting, classifying, describing and explaining the use of strategy tools (Jarzabkowski, 2012). Historically, research on strategy tools has been more inclined to identify what tools are being used in practice, and less towards *how* these tools are being used within organisations (Clark, 1997; Day *et al.*, 1990; Frost, 2003; Hussey, 1997; Prescott & Grant, 1988 & Rigby, 2001 in Gunn & Williams, 2007:202). Also, Jarratt and Stiles (2010:29) advocate for the application of strategy tools to be studied in its context, as to date the application of strategy tools have only been studied independently of the context within which they are used (Bharadwaj, Clark & Kulviwat, 2005; Burt *et al.*, 2006).

As the strategy as practice domain focuses our research on the tacit knowledge of how things work in contrast to the explicit knowledge of strategic management/strategy (Jarratt & Stiles, 2010:29), it is through these methods and understanding the context, that we can understand how strategy tools impact work done in strategy, how they are being enacted and what can be materialised through the use of these (Jarzabkowski, 2012).

5.5.2.9 Synthesis of the current literature on strategy tools

Vuorinen, Hakala, Kohtamä and Uusitalo (2018) provides a very useful and comprehensive review on the literature of strategy tools that has been published in leading journals over the past 25 years. They acknowledge the tremendous value that strategy tools bring to the practitioners of strategy in different forms, utility and functions and further intensifies the notion that only by studying how strategy tools are being utilised, can we understand their essential nature and enhance our strategic thinking and theorising about strategy (Vuorinen *et al.*, 2018:586). Vuorinen *et al.* (2018) reviewed and classified 88 strategy tools (see below Table 5.4) that have been published as “new” in journals by categorising these on two dimensions:

- The focus of strategy work represented by the tool, and

- The phase of the strategy process in which the tool has essence (Vuorinen *et al.*, 2018:592)

Table 5.4: Classification of strategy tools

		The phase of strategy process		
		Strategy architecture (48 tools)	Strategic action (37 tools)	Strategy adaptation (3 tools)
The focus of strategy work	Internal (44 tools) (resources, capabilities, processes, culture)	Tools for analysing internal capabilities, performance, options and feasibility of the strategy (13 tools) e.g. internal organisational assessment, offshoring tool, evaluation of strategic flexibility	Tools for defining objectives, measures, initiative sand capabilities and improving internal processes and resource allocation (29 tools) e.g. business process regeneration, time-driven activity-based costing, strategy map	Tools for understanding current performance in terms of resources and processes (2 tools) e.g. heart of business model, framework for analysing changes in performance
	External (21 tools) (macro environment, industry, positioning, competitors)	Tools for analysing the macro-environment, industry, competitors and the level of risk and return of for determining the strategy (18 tools) e.g. CAGE distance framework, strategy canvas scenario building, risk management tools	Tools for aligning operations to external requirements (2 tools) framework for strategic accounting, framework for redesigning the information systems	Tools for understanding current performance in terms of market factors (1 tool) sources of revenue statement
	Fit (23 tools) (development of the process itself)	Tools for analysing the competitive position by integrating external and internal perspectives and tools for facilitating the strategy formulation process itself (17 tools) e.g. SPACE matrix, Parenting framework Strategy diamond	Tools for improving processes and management related to alliances, partnership, mergers and stakeholders (6 tools) e.g. Best-fit partner selection matrix, alliance partner selection tool, stakeholder management method	No tools in this category

Source: Vuorinen *et al.* (2018:592)

However, from a comprehensive review on the available literature on strategy tools and its use in practice, one domain remains largely undiscovered. The use of strategy tools by

strategy consultants (strategy practitioners external to the organisation) is not adequately explored and addressed in the current literature. The literature features the “managerial” aspect quite prominently and to a lesser extent the strategy “practitioner” (which encapsulates all those who strategise), but explicit focus on external strategy practitioners or strategy “consultants” is almost absent. This study focuses exclusively on strategy consultants as strategists in exploring the phenomena of strategy consultants using strategy tools during a strategic episode.

CHAPTER 6: METHODOLOGY

This study aims to contribute in generating and building on existing theory to explore the interplay between strategy consultants and their use of strategy tools during a strategic engagement¹² or strategy consulting situation. This chapter provides a detailed explanation of the chosen methodology for the study, namely the grounded theory approach. Whilst the study does not necessarily generate a grounded theory, it utilises the grounded theory approach in employing several grounded theory strategies, therefore leaning towards grounded inquiry rather than classic grounded theory itself. The chapter begins by providing a classification of the strategy of inquiry and then proceeds to make explicit the philosophical perspective of the researcher, including a focus on the ontological and epistemological views adopted for this study. It then proceeds to introduce the grounded theory methodology, its processes and the unique strategies associated with grounded theory namely coding, *memoing*, theoretical sampling, constant comparison, theoretical sensitivity and theoretical saturation. Finally, the quality and rigour of this methodology is discussed with specific focus on the most relevant criteria for determining quality in a grounded theory approach. The chapter concludes by addressing the appropriate research ethics pertaining to the chosen methodology of grounded theory and the discipline of social sciences.

6.1 STRATEGY OF ENQUIRY

A research strategy is concerned with the plan a researcher will follow in order to answer certain research questions. The choice of research strategy for this study was guided by the research questions and objectives, the purpose of the research, the extent of time and resources that were available, existing knowledge, and also the ease of access to potential participants and data for the research (Saunders, Lewis & Thornhill, 2012:173). It is also in line with methodological prescriptions for studying strategy as practice (Langley, 2014). The strategy of inquiry for this study had to be adopted according to the exploratory nature of the research and involves a qualitative approach.

¹² The term *strategic engagement* is frequently used in practice to denote a *strategic episode*, whereby the strategy consultant engages with its client in rendering strategy consulting services.

- *Empirical study* – The study can be described as an empirical study since qualitative primary data was gathered through means of semi-structured, intensive interviews and open-ended questionnaires that produced data concerning practices, processes, activities/actions and behaviour of strategy consultants.
- *Basic research* – The study can be considered basic research. It did not attempt to provide any solutions to a real-life business problem (as is the case with applied research) but attempted to provide insight into the actions, behaviour and practices of strategy consultants (Zikmund, 2003:4) in exploring their relationship with strategy tools in practice. The study explored certain theories (including but not limited to practice theory, activity theory, action theory and Giddens' structuration theory) and concepts and adds to the current body of literature by exploring concepts (in this context referred to as categories) and their relationships, properties and dimensions as per the grounded theory approach (Saunders, Lewis & Thornhill, 2009:9).
- *Exploratory research* – The study explores the interplay between strategy consultants and their use of strategy tools and can therefore be described mainly as exploratory research. According to Zikmund (2003:43), exploratory research allows a researcher to gain a better understanding of the dimensions of a stated problem and not necessarily to provide conclusive evidence. The focus of the study is to provide rich data about the phenomenon of *using strategy tools* during a strategy consulting engagement and organically transcends from exploratory research to findings that are sometimes more descriptive in nature.
- *Cross-sectional study* – The study was carried out only once in order to provide the researcher with information at a given point in time and is therefore considered cross-sectional (Cooper & Schindler, 2014:128). The study explored the actions, behaviour and practices of strategy consultants whilst using strategy tools, therefore a cross-sectional study was deemed more suitable as opposed to a longitudinal study, which would consider the changes of actions, behaviours and practices over an extended period of time (Cooper & Schindler, 2014:128). The limitation of time in conducting the study also necessitated a cross-sectional approach as opposed to a longitudinal study.
- *Non-experimental study* – The study is a non-experimental study as the researcher did not exert any control over any variables to determine or influence outcomes.
- *Primary data* – Primary data (also called original research) refers to data collected specifically for the study at hand (Zikmund, 2003:53). Primary data was collected directly

from the initial sample according to the objectives of the study and analysed and applied accordingly, before employing theoretical sampling to allow for richer, saturated data spanning different occurrences and contexts.

- *Qualitative data* – The study was designed to produce rich, in-depth qualitative data that is of exploratory and descriptive nature. Qualitative data was deemed more relevant than quantitative data for this study as knowledge of the phenomenon under study (the relationship between strategy consultants and strategy tools) is very limited and the research objectives relied on the generation of qualitative data. The more qualitative nature of the study aided the exploratory and descriptive nature of it and provided the necessary flexibility for data analysis (Ghauri & Grønhaug, 2005:202), also of relevance to the grounded theory approach that was employed.

6.2 RESEARCH PHILOSOPHY

Philosophy has brought about various schools of thought in research. An overview of major philosophical developments by Burgess in Birks identifies (from an epistemological perspective) two major philosophical schools: the *rationalists* and the *empiricists* (2014:3-4). The major difference between the rationalist and empiricist is that the rationalist believes knowledge can be produced merely through thorough and logical reasoning, whilst the empiricist believes that the role of observation and experience is central to the production of scientific knowledge (Birks, 2014:4). The notion of philosophy can be daunting for a novice researcher, but Birks (2014:2) reminds one that philosophy need not be an ethereal concept: it is simply put as “one’s outlook on life”.

Two very dominant but different paradigms underpin the quantitative and qualitative research paradigms respectively (Petty, Thomson & Stew, 2012: 269). The positivism/post-positivism paradigm (also called the scientific method or empirical science) is mostly associated with quantitative research in a research setting whereby deductive reasoning is employed in order to test hypotheses and generalise results. The other paradigm of interpretivism (also called constructivism) is mostly associated with qualitative research and as the broad research objective or question is only refined during or after data collection, the interpretivist paradigm therefore employs inductive reasoning strategies to explore and

understand and eventually leads to abstraction that informs explanation (Petty *et al.*, 2012:269).

Qualitative research (as opposed to quantitative research) usually begins with certain philosophical positions¹³ that influence the way in which the researcher brings paradigms or beliefs to the research, which in turn influences the writing and design of the study (Creswell, 2007). It is therefore important that the philosophical assumption(s) on which this research is based is(are) made explicit before the chosen ontology, epistemology and methodology are described and explained. This is of significance to the researcher in promoting harmony between the research question, the chosen methodology and the research process behaviour towards this qualitative research study. The main assumptions that underlie both post-positivism and interpretivism are presented below in Table 6.1.

Table 6.1: Assumptions underpinning post-positivism and interpretivism

	Post-positivism	Interpretivism (Constructivism)
Ontology	<ul style="list-style-type: none"> • One objective reality. • Social reality is ordered, and these uniformities can be observed and explained. • Deterministic view of social life such that social action and interaction are the product of external forces on social actors. 	<ul style="list-style-type: none"> • Multiple realities (perspectives). • Reality is socially constructed. • Reality is pre-interpreted, intersubjective world of cultural objects, meanings and social institutions.
Epistemology	<ul style="list-style-type: none"> • Only accepts what can be directly observed by the senses. • Observation is theory neutral. • Discover a reality that will be known imperfectly and probabilistically due to limitations of the researcher. • Absolutist: objective knowledge possible through observation, uncontaminated by theory. • Value-free knowledge. 	<ul style="list-style-type: none"> • Understand the multiple social constructions of meaning and knowledge. • Requires insider status; researcher being immersed, to learn the local language, meanings and rules. • Relativist: ultimate truths are impossible. • Knowledge is value laden.
Knowledge	<ul style="list-style-type: none"> • Objective knowledge (facts) can be gained from direct observation or experience but is imperfect and fallible. • Theories, hypotheses, background knowledge and values of the 	<ul style="list-style-type: none"> • Observation involves interpretation

¹³ Also referred to as paradigm, epistemology, research tradition or research philosophy (Eriksson & Kovalainen, 2016:18).

	Post-positivism	Interpretivism (Constructivism)
	researcher influence what is observed.	
Purpose of research	<ul style="list-style-type: none"> • Deductive reasoning strategies tests hypotheses. • General laws and theories that explain and predict. • Results can be generalized. 	<ul style="list-style-type: none"> • Inductive reasoning strategies to explore, describe, understand, explain, change, evaluate. • Analysis of the frames of meanings of social actors obtained from everyday concepts, meanings and accounts; abstraction leads to explanation. • Findings are specific to time and place.
Research question and hypotheses	<ul style="list-style-type: none"> • Explicitly defined at the start of the study. 	<ul style="list-style-type: none"> • Broad research question that becomes refined during data analysis. • Does not identify hypotheses.
Research instrument	<ul style="list-style-type: none"> • Often uses external instruments that ideally are valid and reliable. Researcher may also act as observer. 	<ul style="list-style-type: none"> • The researcher.
Participants	<ul style="list-style-type: none"> • Subjects are passive. 	<ul style="list-style-type: none"> • Participants actively involved in constructing the 'reality' with the researcher
Relationship between researcher and participants	<ul style="list-style-type: none"> • Detached and impersonal. Researcher to remain objective. • Participants are subjects to be studied. 	<ul style="list-style-type: none"> • Involved, immersed in the participant's world. Participants are actively contributing.
Data	<ul style="list-style-type: none"> • Measure. Quantitative data (numbers) is derived from strict rules and procedures. 	<ul style="list-style-type: none"> • Interpret words (spoken or written) and meanings to gain understanding of phenomena.
Variables	<ul style="list-style-type: none"> • Controlled 	<ul style="list-style-type: none"> • Not controlled
Role of lay language	<ul style="list-style-type: none"> • Reject lay language. • Language describes objects in the world, therefore precision important. 	<ul style="list-style-type: none"> • Accepts lay language as the very medium of social life.
Credibility	<ul style="list-style-type: none"> • Replication 	<ul style="list-style-type: none"> • No attempt to replicate studies
Natural vs Social Science	<ul style="list-style-type: none"> • Possible to use assumptions and methods in natural sciences and social science. 	<ul style="list-style-type: none"> • Fundamental differences between natural sciences to social science requiring different procedures.

Source: Adapted from Petty *et al.* (2012)

As a seminal author in the strategy as practice research domain, Langley advocates for the use of either post-positivism or interpretivism (constructivism) in approaching strategy as practice research (2014). However, Langley (2014) specifically emphasises the role of interpretivism to better understand the meanings that human beings give to the phenomena

under study, in order to fully understand reality as being socially constructed. In view of the aforementioned theoretical proposition of interpretivism as well as the suitability of the philosophy to answer the research question(s), the most applicable major research paradigm adopted for the study was that of interpretivism. The interpretivist (or constructionist¹⁴) approach is concerned with subjective and shared meanings and therefore the way in which people (whether as individual or collective) interpret and understand social events and settings through their participation in it (Eriksson & Kovalainen, 2016:18; Willis, 2007:98). Willis (2007:98) describes interpretivism as “the assumption that social reality is constructed by the individuals who participate in it... individuals gradually build their own understanding of the world through experience and maturation... focus on the study of multiple social realities, that is, the different realities created by different individuals as they interact in a social environment”. Interpretivism therefore focuses on understanding the specific details of particular situations, either individually or in the collective and even within the organisation (Willis, 2007:242). The main characteristics of the interpretivist approach is summarised in Table 6.2 below.

Table 6.2: Characteristics of the interpretivist approach

Characteristics	Interpretivism
Nature of reality	Socially constructed
Purpose of research	Reflect understanding
Acceptable methods and data	Subjective and objective methods are acceptable
Meaning of data	Understanding is contextual
	Universals are deemphasized
Relationship of research to practice	Integrated activities
	Both guide and become the other

Source: Willis (2007:95).

For the purpose of this study the ontological, epistemological and methodological assumptions (as opposed to the inclusion of axiological and rhetorical assumptions) are deemed significant and will be therefore subsequently discussed.

¹⁴ The constructionist approach is also referred to as methodological interpretivism (Eriksson & Kovalainen, 2016:18)

6.2.1 Ontological view

Eriksson and Kovalainen describe ontology as “the ideas about the existence and relationship between people, society and the world in general” (2011:14). They describe the ontological view in qualitative research as mostly *subjective* as qualitative research is based on the experiences and perceptions of individuals that partake in the research (Eriksson & Kovalainen, 2011:14). It is of importance for research that follows a qualitative approach to display an understanding of two important concepts in ontology, namely that of *existence* and *reality* (Birks, 2014:7). The notion of *existence* is important in qualitative research as this type of research is concerned with the “how” and “why” situations within the social world. In contrast, quantitative research is more concerned in proving the “that” – evidence that a natural phenomenon does in fact exist (Birks, 2014:7).

The interpretivist perspective does not necessarily reject the post-positivist perspective that argues that a single reality (simply put, a fact) beyond our social construction exists (Birks, 2014:7; Willis, 2007:2). Rather, the interpretivist argues that this single reality can simply not be an independently knowable reality and that the premise of post-positivism in learning about the world, is not as objective as the scientific method would have it (Willis, 2007:2). Rather, researchers only have access to what we know as it is socially constructed (Willis, 2007:4).

6.2.2 Epistemological view

The branch of philosophy concerned with the study of knowledge is known as epistemology (Birks, 2014:3). While ontology explores the concept of reality, epistemology examines “the ways in which it is possible to gain knowledge of this reality” (Petty, Thomson & Stew, 2012: 270). Perhaps more simply put, Eriksson and Kovalainen (2011:15) define epistemology as the criteria by which the production of knowledge is possible. There are a few philosophical directions associated with the epistemological view of a study (Eriksson & Kovalainen, 2011:15):

- *Empiricism* – Reality consists of material things that can be observed (associated with positivism)

- *Subjectivism* – Reality is a social construct where knowledge can only be attained through contributors (associated with interpretivism)
- *Substantialism* - Reality consists of material things but is interpreted differently in different contexts (associated with critical realism).

This study adopts an epistemological view of subjectivism due to its association with the interpretivist paradigm.

6.3 METHODOLOGY

Perhaps one of the most important decisions in conducting research is the selection of an appropriate, sound methodology and research method that will answer the research question best (Petre, 2010). In considering the research question, Trafford and Leshem (2008:90) argue that the research methodology should be chosen in consideration of how the researcher believes the data will best answer the chosen research question(s) or pursue the research objective. The methodology for the study is critical since it will heavily determine how the research is being thought about, and how subsequent choices are made for the research design, such as how to engage with the research participants and the data that is collected from the population (Mills, 2014:3).

As a starting point to motivate for the appropriate research methodology, it is worth briefly revisiting the research objective: “*The purpose of this study is to explore the interplay between strategy consultants and their use of strategy tools in their everyday strategy consulting work*”. Keeping in mind that the nature of the research objective is almost exclusively exploratory in nature, it should rely heavily on qualitative inquiry (Cooper & Schindler, 2014:129). In considering qualitative methodologies, Mills (2014:6) provides a comprehensive comparison of possible research philosophies (as discussed in paragraph 6.2) with its appropriate qualitative methodologies, listed below in Table 6.3.

Table 6.3: Map of methodologies

Theme of Knowledge	Qualitative Methodology	Outcome
Positivism		
Post-positivism	Grounded theory	Knowledge of Process & Outcome

Theme of Knowledge	Qualitative Methodology	Outcome
Critical + Feminism + Race	Discourse Analysis	Knowledge of Discourse, Illumination & Change
	Ethnography	Knowledge, Illumination & Change
	Narrative inquiry	Knowledge, Illumination & Change
Constructivism or Interpretivism	Ethnography	Knowledge of Culture
	Grounded theory	Knowledge of Process & Outcome
	Historical Research	Knowledge of History
	Case study	Situated Knowledge
	Phenomenology	Knowledge of Lived Experience
	Action Research	Knowledge of Process, Outcome & Change
Participatory + Postmodern	Action Research	Knowledge, Participatory Process, Outcome & Change
	Discourse Analysis	Knowledge of Discourse
	Case study	Situated Knowledge & Change
	Grounded theory	Knowledge of Process, Outcome & Change

Source: Mills (2014:6)

Mills (2014) suggests five qualitative methodologies that reflect appropriate research inquiry for interpretivism, namely those of ethnography, grounded theory, historical research, case study, phenomenology and action research. The next step in selecting a qualitative methodology for the interpretivist perspective would be in determining the most appropriate methodology in terms of:

- Desired outcome to answer the research objective (Petre, 2010:98),
- A methodology that is a widely accepted research approach in the discipline (Petre, 2010:98) and
- The consideration of the three major challenges for a doctoral study in terms of constraints, practicality and time (Trafford & Leshem, 2008:89).

In the context of the strategy as practice domain, there are particular considerations in terms of the applicable theory and methodologies that are advocated for researching strategy as practice. As strategy as practice is concerned with the actions and activities of the practitioners of strategy in the organisation (Johnson *et al.*, 2003), the chosen methodology should consider both the empirical phenomenon of practices within the organisation as well as the proposed practice-based theories on which the strategy as practice domain relies (Langley, 2014). Grounded theory has been identified as such a suitable method that will:

- Satisfy the requirements for choosing a sound methodology for Doctorate degree level,

- Satisfy the prescription of seminal strategy as practice authors advocating for the use of grounded theory as methodology, and
- Satisfy the requirements of choosing an appropriate methodology that is suited for this interdisciplinary approach between social science and management science.

6.3.1 Grounded theory

As the pioneers of grounded theory, sociologists Glaser and Strauss describe grounded theory shortly as “the discovery of theory from data” (1967:1). Charmaz, a prominent author on grounded theory and qualitative research methods in general, describes grounded theory as a qualitative research method that creates a conceptual framework (or a theory) from empirical data through the use of inductive analysis (2006:187). The name *grounded theory* is derived from the approach whereby the analytical *categories* that are developed through this method are “grounded” within the empirical data that is obtained (Charmaz, 2006:187).

The concept of *Grounded Theory* is twofold: it refers to both methodology and product of the methodology (Charmaz & Bryant, 2010:406). Grounded theory as a research methodology emerged from the 1960s when sociologists Glaser and Strauss joined minds in studying the phenomenon of *dying* within a variety of hospital settings (Glaser & Strauss, 1965). The researchers observed, interviewed and documented the way in which medical practitioners and patients responded to death (Charmaz, 2006:4). The publication of Glaser and Strauss’s subsequent book *The Discovery of Grounded Theory* in 1967 was advantageous to the methodological scene in the 1960’s. It provided much needed support for the qualitative methodology domain as it waned with the emergence of more sophisticated quantitative methodologies (Charmaz, 2006:4). Their meticulous approach was concerned with the development of theory through a reiterative process of discovery and induction, rather than the traditional approach of hypothesis testing and deduction that dominated the methodological landscape during that time (Elliott & Lazenbatt, 2005:49; Charmaz, 2006:4).

What was deemed a revolutionary methodological approach, allowed Glaser and Strauss to develop “systematic methodological strategies” that were subsequently assimilated and applied to a variety of other topics within the social sciences (Charmaz, 2006:4). These

grounded theory strategies later proliferated to various disciplines and professions (Charmaz, 2014:1075). Charmaz and Bryant further explain their characteristics as “systematic, but flexible, guidelines for data gathering, coding, synthesising, categorising, and integrating concepts for the explicit purpose of generating middle-range theory” (2010:406). The premises or distinctive characteristics of grounded theory as an inductive, theory discovery methodology is entrenched in the ability of this methodology to develop a theoretical explanation of distinguishable features of a phenomenon whilst simultaneously grounding this developed theory in the qualitative data or empirical observation (Charmaz & Bryant, 2010:406; Remenyi, 2014:4).

6.3.2 Perspectives on grounded theory

The original work by Glaser and Strauss (1967) attempted to reconcile two opposing sociological research traditions – that of positivism and pragmatism. Many of the rigorous quantitative principles such as the coding methods and emergent concepts, came from empiricist-oriented Glaser who had advocated for more middle-range theories that exhibited data as foundation. On the other hand, with an intricate social view of processes rather than structure, Strauss brought the concepts from emergent processes, subjectivity and human agency to the construction of the grounded theory method, reflecting a strong pragmatist approach (Charmaz, 2014:9). This rigorous and systematic approach subsequently inspired scholars not only from the nursing profession, but also in the broader social sciences and several other professions to pursue qualitative theory and make use of grounded theory as a qualitative method of choice (Charmaz & Bryant, 2010:406).

Shortly after the publication of *Discovery*¹⁵ by Glaser and Strauss in 1967, Glaser and Strauss found that they had fundamental differences on a few of the key theoretical as well as philosophical assumptions of their *classic* grounded theory approach (Howard-Payne, 2015:52). The grounded theory method diverged into what can be broadly termed as the “*Glaserian*” approach to grounded theory (the more classical post-positivist approach) and the “*Straussian*” approach (the more constructivist approach) to grounded theory (Howard-Payne, 2015:52). Strauss, though conserving the inductive and iterative inquiry, took

¹⁵ Strauss, A.L & Glaser, B. 1967. *The Discovery of Grounded Theory*. Chicago: Aldine Publishing.

perhaps a more informal approach and later developed the Straussian approach with Corbin in 1990. Glaser criticised this divergent approach of Strauss and Corbin which ought to remain consistent with the original proposed principles of grounded theory, with a more stringent focus on discovery, narrow empiricism and developing concepts that were deemed variables (Charmaz, 2014:11). According to Howard-Payne (2015:52-57) there are six unique contentions between the Glaserian and the Straussian perspectives on grounded theory:

- Their differences in ontological and epistemological positions
- Their differences with regards to the role of the researcher
- Their difference with regards to when the literature view should be conducted
- Their difference in the formulation of the research questions
- Their differences with regards to the coding and analytical processes, and
- Their approach to the verification of the grounded theory.

Table 6.4 below contains a comparison between the Glaserian and Straussian perspectives to grounded theory, which include the six unique contentions discussed above.

Table 6.4: Glaserian vs Straussian Grounded Theory

“Glaserian”	“Straussian”
Beginning with general wonderment (an empty mind)	Having a general idea of where to begin
Emerging theory, with neutral questions	Forcing the theory, with structured questions
Development of a conceptual theory	Conceptual description (description of situations)
Theoretical sensitivity (the ability to perceive variables and relationships) comes from immersion in the data	Theoretical sensitivity comes from methods and tools
The theory is grounded in the data	The theory is interpreted by an interviewer
The credibility of the theory, or verification, is derived from its grounding in the data	The credibility of the theory comes from the rigour of the method
A basic social process should be identified	Basic social processes need not be identified
The researcher is passive, exhibiting disciplined restraint	The researcher is active
Data reveals the theory	Data is structured to reveal the theory
Coding is less rigorous, a constant comparison of incident to incident, with neutral questions and categories and properties evolving. Take care not to “over-conceptualise”, identify key points	Coding is more rigorous and defined by technique. The nature of making comparisons varies with the coding technique. Labels are carefully crafted at the time. Codes are derived

“Glaserian”	“Straussian”
	from “micro-analysis which consists of analysing data word-by-word”
Regarded by some as the only “true” grounded theory method	Regarded by some as a form of qualitative data analysis (QDA)

Source: Onions (2006:5)

Another divergent approach of grounded theory, referred to as *constructivist* grounded theory, developed in the 1990s. This approach adopts the original inductive and iterative inquiry as Glaser and Strauss’s original approach and also incorporates the emphasis from Strauss’s pragmatist tradition. However, the constructivist approach illuminates the flexibility of the grounded theory method and avoids mechanical applications of the approach, emphasising its transferability across several other epistemological and ontological stances in various disciplines. This is achieved through the constructivist approach of dismissing the notion of neutral observation in the fact that the values and preconceptions of researchers shape their analysis of the theory that they create. Of importance within the constructivist approach to grounded theory is the realisation that research as construction occurs under certain conditions that may not always be preferred or even recognised (Charmaz, 2014:13).

For the purpose of this study, the *Straussian* school of thought was adopted for various reasons. Whilst the classic Glaserian perspective of grounded theory dismisses the notion of *a priori* theorising and suggesting that the researcher should enter the study with no preconceived problem statement, the nature of conducting a doctoral study requires an extensive literature review (encompassed within a research proposal) and defining a problem statement before commencing with the research. Therefore, it cannot be disputed that the researcher not only has a general idea of where to begin, but has a rather higher level of theoretical sensitivity towards the data than in the case of a Glaserian approach which avoids familiarity with the existing literature prior to data collection. However, the study does lean towards the constructivist approach as it adopts the original grounded theory strategies, but also acknowledges the researcher’s intense involvement in the process of generating and analysing the required data in pursuing the research objective (Charmaz, 2014:14). Furthermore, Glaser and Strauss advocate for researchers to use the original grounded theory strategies in a flexible manner, following their principles only as guidelines (Charmaz, 2014:16). As a problem statement or research objective has been determined *a priori*, the researcher was predisposed to forcing the theory to some extent with semi-

structured intensive interviewing in order to explore the phenomena identified in the problem statement and to subsequently pursue the research objective. The researcher also played a more active role in the research due to the nature of data collection, i.e. intensive interviewing, and interpreted the data from an interpretivist perspective with the aim of subsequently contributing to theory-building around the phenomenon of strategy consultants using strategy tools.

6.3.3 The grounded theory process

Remenyi (2014:13) describes grounded theory as a rigorous process in itself, yet one that emphasises flexibility, therefore allowing the researcher to explore opportunities in discovering emergent data through a systematic and guided approach. With the premise of grounded theory as a flexible process, Remenyi (2014:38) points out that no two researchers will apply grounded theory in the exact same way and Locke (2001:33) therefore encourages the researcher to use his or her creative and intellectual imagination in formulating a middle-range theory that is rooted in the empirical data.

It should be noted that the grounded theory process is a systematic, but reiterative and emergent process (Remenyi, 2014). It is difficult to lay out a step-by-step process to follow in order to generate grounded theory as it could create a misleading, linear process (Remenyi, 2014:147). Charmaz (2014:18) therefore reiterates that the grounded theory process is not linear as the literature might suggest. Analytic connections could occur at any instance during the research and therefore prompts the researcher to stop - and explore ideas whenever these occur. Charmaz (2006:5-6), Hallberg (2006:143-144) and Remenyi (2014:148) identified certain components or characteristics of the grounded theory process, which allows one to identify the steps in the overall process a bit easier:

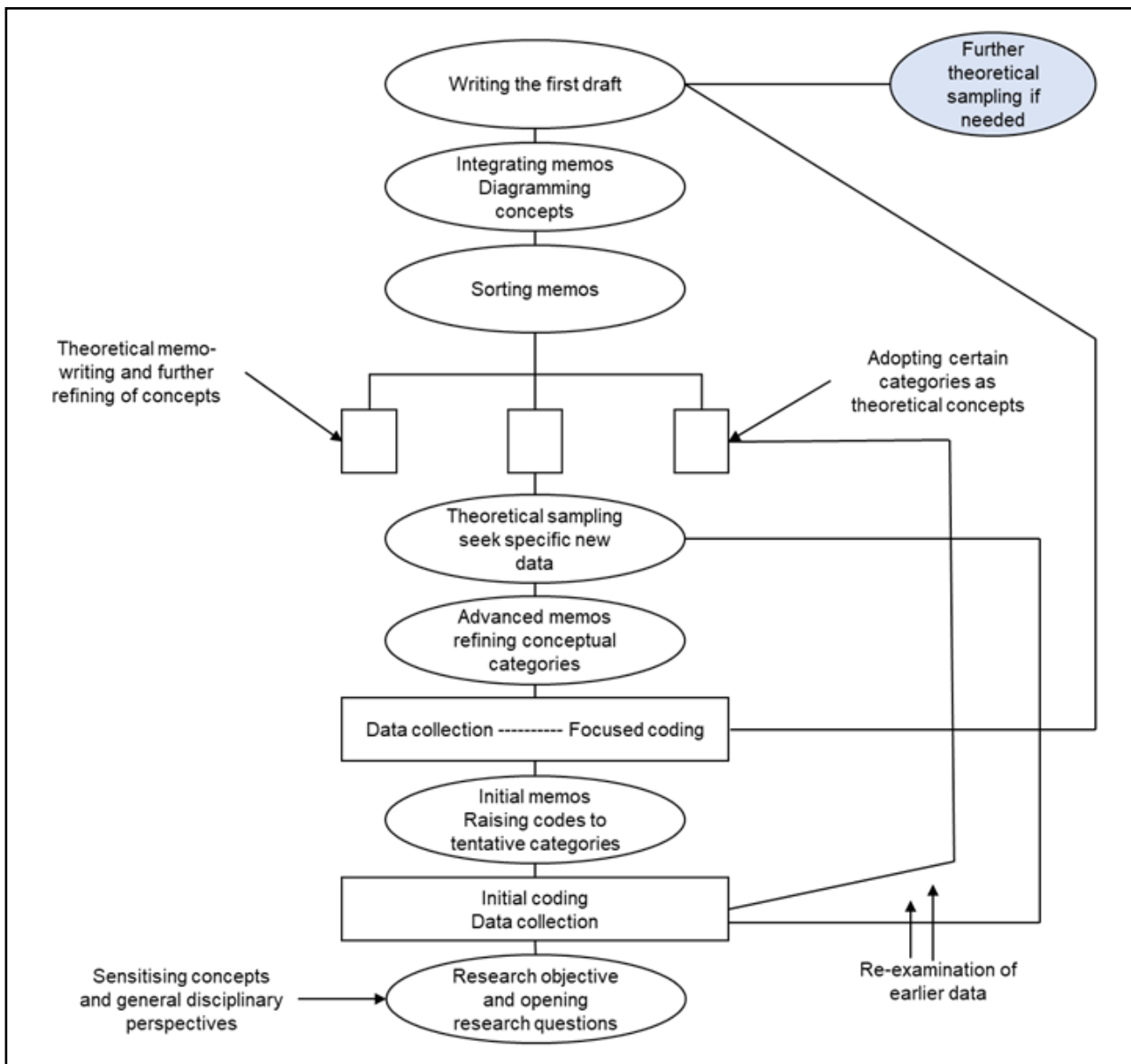
- The **collection and analysis of data occurs simultaneously** in order to maximise variations in descriptions from participants.
- This simultaneous process of collection and analysis allows for the **emerging results to indicate the direction of the data analysis** and guide the interviewer in the type of questions to ask.

- By using **intensive interviewing**, the participant can describe his or her experiences and perspectives in order for the researcher to explore the area of interest in-depth in a rich social description.
- The researcher **constructs codes and categories** by analysing the data through **several coding processes**, namely initial, focused and theoretical or axial coding. These codes and categories are from the qualitative data, rather than from preconceived logically deduced hypotheses.
- The use of **memo-writing (also referred to as memoing)** to allow the researcher to specify and refine categories and their properties by formulating ideas and assumed associations, as well as the researcher's reflection during the entire analysis.
- Data is collected until no new data is generated – a point called **theoretical saturation**.
- The standard **literature review is usually conducted only after** the independent analysis has occurred, but variations on this approach exist.

In Figure 6.1, Charmaz (2006:11) provides a graphic illustration of the process of grounded theory (or generating grounded theory) by focusing on these key elements and concepts in the grounded theory process. According to Charmaz and Bryant (2010:410), three of these strategies in particular (displayed in Figure 6.1), distinguish the grounded theory method from other qualitative approaches:

- Coding of the data
- Memo-writing (memoing), and
- Theoretical sampling.

Figure 6.1: The Grounded Theory process



Source: Charmaz (2006:11)

These grounded theory strategies (among other strategies such as constant comparison, theoretical sensitivity and theoretical saturation) are discussed subsequently.

6.3.4 Data collection method

As the interview is a dominant data collection tool in qualitative research, the methodology employed the method of intensive interviewing for data collection (Cooper & Schindler, 2014:152). Intensive interviewing is perhaps even more appropriate given that much of

grounded theory data collection relies on interviewing (Charmaz, 2014:85; Remenyi, 2014:14). Consistent with the philosophical paradigm applied in this study, i.e. *interpretivism*, interviewing is a critical step in order to discover interpretations – this would only be possible by talking to the study participants (Langley, 2014). Following an approach that hinges towards the Straussian approach to grounded theory, the researcher also conducted the interviews as the researcher had a fuller understanding of the phenomena in order to grasp the institutionalised language and practices of strategy consultants and to identify certain beliefs.

Intensive interviewing involves the researcher having a “gently-guided” conversation that explores the research participant’s experience with the research topic (Charmaz, 2014:56). Usually, with the onset of the intensive interviewing phase, the research topic may be either broad or narrow in its focus. Some of the essential characteristics of the intensive interviewing process included:

- Selecting participants who have had direct and recent experience in the research topic
- In-depth exploration of the research participant’s most recent experiences
- Relying on open-ended questions
- Obtaining detailed responses from the participants
- Emphasising the necessity to understand the participant’s meanings and perspectives
- Employing a practice of probing and following up on unanticipated areas of inquiry (Charmaz, 2014:56).

As the research topic had to be pre-approved before data collection could commence, the research topic (i.e. the relationship between strategy consultants and their use of strategy tools) was clearly delineated and the researcher had a clear idea on the boundaries of the interviewing process, but avoided a narrow focus in order to allow concepts and categories to emerge organically from the interviews. The research schedule for the data collection at the onset of the study was rather broad but was aligned with the research objective. Following the *Straussian* approach to grounded theory, the researcher had a general idea of where to begin and the questions could somehow be structured in order to force the data to conform to the idea (i.e. the *relationship*) that was being researched. Following the prescriptions of Charmaz (2014:70) on appropriate research etiquette (depicted below in Table 6.5), the researcher conducted a total of 11 interviews.

Table 6.5: Do's and don'ts of intensive interviewing

Do's
<ol style="list-style-type: none"> 1. Listen, listen and listen some more. 2. Try to understand the described events, beliefs and feelings from your research participant's point of view, not your own. 3. Aim to be empathetic and supportive. 4. Build trust. 5. Encourage your research participant to state things in his or her own terms. 6. Let the participant explore a question before you ask for more specific probes. 7. Ask the participant to elaborate, clarify, or give examples of his or her views. 8. Be sensitive to the participant's non-verbal responses to you and your questions. 9. Revise a question that doesn't work. 10. Be willing to take time for unanticipated issues that might come up. 11. Leave the participant feeling positive about the interview experience and about self. 12. Express your appreciation for the opportunity to talk with (and, perhaps, get to know) him or her.
Don'ts
<ol style="list-style-type: none"> 1. Interrupt. 2. Correct the research participant about his or her views, experiences, or feelings. 3. Interrogate or confront. 4. Rely on "do you" and "did you" probes (These questions elicit <i>yes</i> or <i>no</i> responses, rather than information and reflections). 5. Ask "why" questions. 6. Ask loaded questions (Try to frame questions, even follow-up questions, in neutral terms). 7. Expect your research participants to answer questions that you would be unwilling to answer. 8. Take an authoritarian stance in the interview (establish equality, not authority). 9. Ignore or gloss over what the participant wishes to talk about. Be willing to take more time with him or her, if need be. 10. Forget to follow up and thus overlook clarifying points and/or asking for further thoughts and information. 11. Truncate the interview to get it over "on time". 12. Leave when the participant seems distressed.

Source: Charmaz (2014:70-71)

The original research schedule for the initial interviews is attached as Annexure B. With knowledge on the phenomena of *strategy consultants using strategy tools* as the departure point for data collection, these interview schedules allowed the researcher to ask a few specific questions pertaining to the phenomena, which were then used as a basis to further explore the phenomena by probing with appropriate, subsequent questions within each area to gain a broader understanding of the phenomenon and the relationship between strategy consultant and strategy tool. Guided by the suggestions of Charmaz (2014:71) on negotiating contextualised interviews, the researcher conducted the interviews in a manner that steered the conversation around the topic in such a way to allow exploration of the topic, whilst being sensitive to the participant's well-being as well as the personal interaction, impressions and relationship constructed through interviewing the research participant. The

intensive interview method allowed the researcher to pursue key theoretical concerns and to continuously revisit and reframe the emergent concepts and conceptual categories through subsequent interviews. Interviews were recorded digitally and transcribed after each interview with the aid of voice-typing software. After transcribing each interview, the transcript was checked for accuracy by cross-checking the transcript with the original audio and making corrections where necessary. Each interviewee was also afforded the opportunity to check their interview transcript for accuracy thereof. Extracts of the interview transcripts as they were prepared for analysis (coding) are attached as Annexure E, also illustrating some elements of the open coding process as discussed in paragraph 6.3.5 simultaneously. Combined with other grounded theory strategies such as memoing, intensive interviewing allowed the researcher to seek theoretical precision through all materials that were available to the researcher (Charmaz, 2014:108).

6.3.5 Coding

In the grounded theory process, the researcher must decide how to arrange the data in order to get to a specific understanding of the data, and to ultimately answer the research question or objective (Remenyi, 2014:17). Such a grounded theory strategy for arranging data is called coding, a process during which the researcher synthesises and conceptualises the data that has been gathered through either interviewing or observation (Charmaz & Bryant, 2010:410). Coding refers to the naming of certain segments of the collected data with a “label” that “categorises, summarises and accounts” for each data segment. Coding takes the data segments beyond mere statements to analytical sensemaking of some sort that illuminates the meaning of the data. It is through this coding process that the researcher learns about the data, making sense that shapes the consequent analysis of the data. Charmaz describes coding as the “pivotal link” between the data collection and the development of an emerging theory that could explain the data (Charmaz, 2014:111-114). Coding is considered to be the first step in the process of creating core or conceptual categories from the data collected in order to provide different ways or perspectives of looking at the phenomenon (Locke, 2001:47). Glaser and Strauss used the word “coding” to describe the way in which the researcher composes the name or label for what is represented within a specific fragment of the data (Locke, 2001:47). This process of coding

allows the researcher to define and conceptualise what is happening in the data, and then engage with it to deduct meaning (Charmaz, 2006:46).

The process of coding in grounded theory is not a simple process. There is no mechanic formula that exists for this process of data analysis. It is a rather intense, emergent process with the researcher moving back and forth between naming, comparing and changing the data. With each subsequent round of coding, the researcher moves to a higher level of concept or category, ultimately reducing the coding to abstract concepts or constructs of which a theory could be generated from (Remenyi, 2014:18). On a high level, there are at least two stages involved in coding data in the grounded theory process (see Figure 6.1):

- An initial stage, called *initial coding* or *open coding*, and
- A second stage called *focused* or *selective coding* (Charmaz & Bryant, 2010:410).

6.3.5.1 Initial or open coding

During this initial stage of coding, the data generated can be coded by coding each word, each line or even a segment or paragraph of data (Charmaz, 2006:46). The initial coding enabled the researcher to make decisions about the categories that emerged from the data, and how these categories eventually became conceptual categories central to the objective of theory building (Charmaz, 2006:47). This initial coding phase allowed the researcher to “mine” for analytic ideas that were used in subsequent interviews and to explore several possible theoretical directions, and lastly ensuring an openness of coding that allowed several new ideas to emerge from the data (Charmaz, 2014:114, 117). Although the original grounded theory prescriptions recommended coding by discarding all foregoing or preconceived ideas or concepts (Glaser, 1978), it should be acknowledged that all researchers hold prior skills as well as ideas and are therefore influenced by the knowledge that they have accumulated (Charmaz, 2014:117). Dey (1999:251) aptly states that “There is a difference between an open mind and an empty head”, a thought that constantly resonated throughout the initial coding of the data to ensure the researcher acknowledges how previous experiences could potentially influence the way in which the data is interpreted (Charmaz, 2014:117).

The initial coding process is predominantly concerned with coding data as actions where possible (Charmaz, 2006:48). Glaser (1978) suggested that coding with gerunds (i.e. words

ending with *-ing* such as conversing, gathering etc.) will allow the researcher to gain a strong sense of both action and process/sequence (Charmaz, 2014:120). During the study's initial coding process, it became apparent that the ability to code in *gerunds* as recommended was heavily dependent on how the questions were posed to the interviewee as well as the ability of the interviewee to recall his or her actual experience of using the strategy tool. As initial codes are provisional, the researcher always remained open to the potential of the data reflecting other analytic possibilities and therefore changed or altered it through the grounded theory strategy of constant comparison in order to create codes that best fitted the data which was being presented (Charmaz, 2006:48). These descriptive codes illustrated how the researcher saw, interpreted and described the data through the language utilised to understand the empirical world (Charmaz, 2014:114) within this context of strategy consulting. The initial coding phase allowed the researcher to discover essential gaps in the early data, and subsequently guided the following theoretical sampling in order to close these gaps with appropriate data (Charmaz, 2006:48). It was also important for the researcher during the initial or open coding process not to have any pre-coding ideas or to adopt coding paradigms from extant theories as this would have precluded the ideas or concepts to emerge naturally from the data that was being coded (Charmaz, 2006:48). The following guidelines as proposed by Charmaz (2006:49) were followed during the initial coding phase:

- Remaining open throughout the coding process
- Staying close to the data
- Keeping codes simple and precise
- Constructing short codes
- Preserving actions
- Comparing data with data, and
- Moving quickly through the data.

Data collected through interviewing for this study was coded line-by-line, an approach recommended by Charmaz (2006:51) who suggests that line-by-line coding is a helpful first step as it forces one to have a fresh perspective towards the data and avoid the researcher becoming too immersed in views and larger themes. Figure 6.2 is an extract from an interview transcript in order to demonstrate how line-by-line coding was conducted.

Figure 6.2: Line-by-line coding: an extract

99	follow a typical classical way of doing strategic planning I describe to them what I believe should be in	sharing view
100	each of the component source of teaching planning	sharing view
101	Which was a mission and vision, strategic goals and strategic objectives The marketing component the	tool determines (components)
102	competitor analysis The situational analysis components and the Best financial indicators and then I	tool determines (components)
103	allowed the strategic planners to formulate in their own Minds what the strategy should be. I think took on	formulating strategy (independi
104	the position of overseer or Mentor to see what the strategic plan they had developed looked like I then	manager (mentoring)
105	gave my input and we discussed each of the components of the strategic plan and spoke about why each	discussing (components)
106	of the components was created and what was the rationale behind it and what was the evidence behind it	discussing (rationale/evidence)
107	and in the end it was a cooperative process of developing a strategic plan for the client	cooperating (team)
108		

Source: From interview transcript.

Though this might seem like a lengthy exercise, it proved very valuable to the researcher by emphasising analytical ideas that might not have come to light through general thematic analysis (Charmaz, 2014:125). Line-by-line coding was particularly helpful to analyse the detailed data that was obtained by forcing the researcher to look for patterns, analyse events and understand how these occurred (Charmaz, 2014:125). Some examples from the open coding process are listed below in Table 6.6 to illustrate the open coding process throughout the analysis of the data. An initial amount of 2197 open codes were developed through line-by-line open coding,

Table 6.6: Open coding: examples from the research

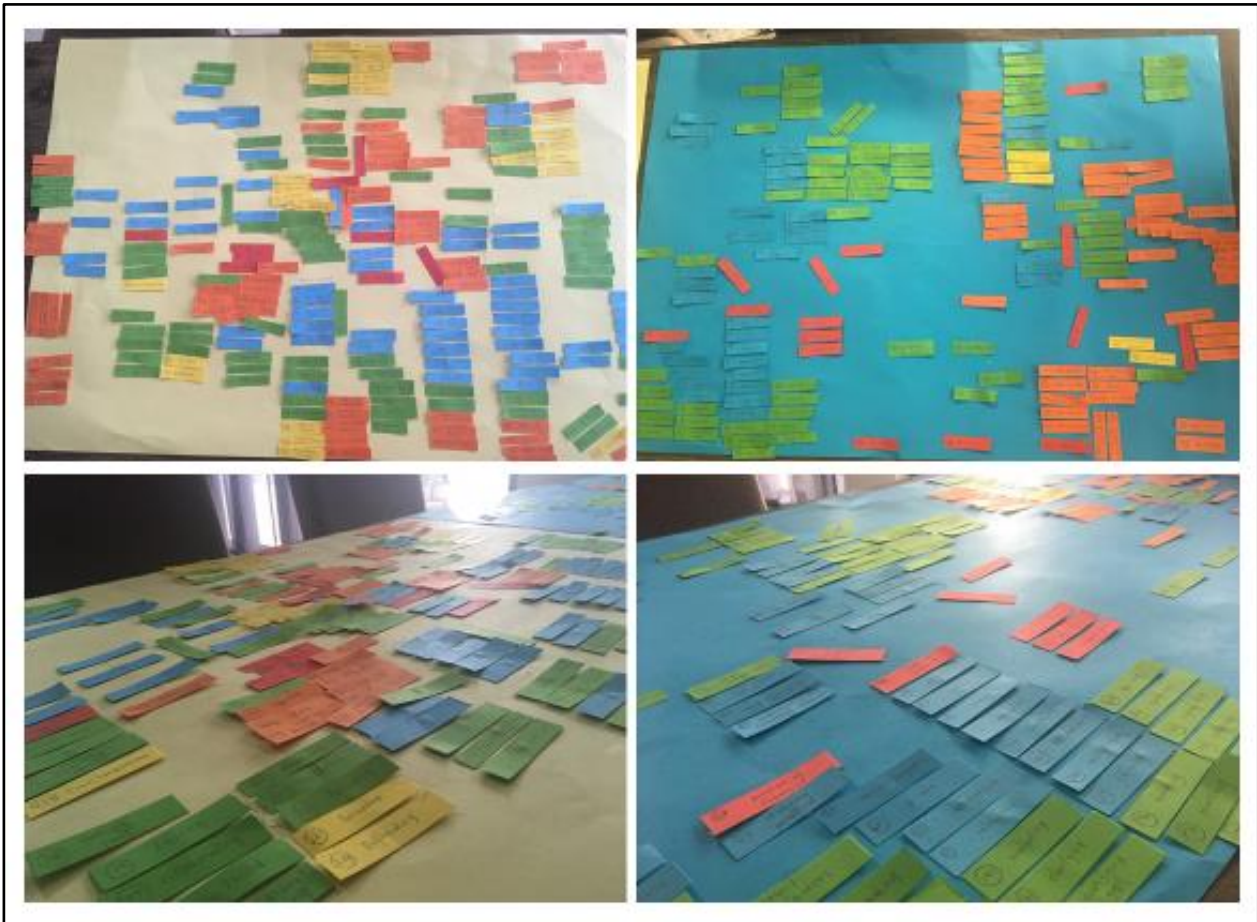
Quote	Open code
<i>"...listen objectively to what other people have to say and to try and extract whatever wisdom other people have..."</i>	Listening
<i>"... I describe to them what I believe should be in each of the component source..."</i>	Sharing view
<i>"... advisors had some understanding of human resources, finance, procurement..."</i>	Understanding
<i>...but those interviews can become key...</i>	Interviewing
<i>"There was a principal, then there were two seniors and analysts"</i>	Hierarchical team
<i>"...interviews can be harnessed in the right ways to influence the strategy"</i>	Influencing
<i>...there's a variety of factors I think, trying to, for particular problems we would use particular tools...</i>	Choosing strategy tool
<i>"Apply their minds to solving complex business problems, defining a solution..."</i>	Problem-solving
<i>"But I think there is a lot that goes into staffing requirements based on the..."</i>	Staffing
<i>"Once they have clear visibility of what is going on, the intent and the trust has been built, I think..."</i>	Trusting
<i>"...you would summarise them into a slide with some sort of graph, some commentary to essentially depict the picture of what your insights..."</i>	Consolidating information
<i>"...may not necessarily know how to use Excel or even use PowerPoint so there will be a big learning curve..."</i>	Learning
<i>"... the trick is to not get a biased opinion from just one interview..."</i>	Information finding

Quote	Open code
“... work alongside the client in order to figure out moving forward what ...”	Collaborating
“I think they make it easier to structure stuff. It is very easy to identify...”	Tools enabling (structure)
“... number five, and I was like how do you know? And she answered from experience”	Being experienced
“... bur it is mostly because he already knew what he wanted but he didn't have the team or the executive committee buying into it...”	Legitimising decision

Source: Own data from the study.

In an attempt to make analytical sense of the various open codes and to establish linkages between open codes, the researcher also visually arranged these open codes during the earlier stages of interviewing and coding in order to understand how to structure subsequent interviews and enhance the overall data collection and coding process. Photographs taken of a *visual map* that was constructed during the early phases of the coding are presented below in Figure 6.3.

Figure 6.3: Open coding: visual sensemaking of codes



Source: Own photographs.

Another key concept in initial coding is that of *in vivo* coding. *In vivo* codes generally refer to the special language (or jargon) used by participants which might suggest words that have significant meanings, or reflect certain experience of the participant (Charmaz, 2006:55). On an organisational level, these *in vivo* codes could reflect imperatives that frame action for a group of participants (Charmaz, 2006:56). It is important to note, however, that *in vivo* codes do not stand on their own in the grounded theory categories that are developed, but *in vivo* codes must be integrated within the theory that emerges from the data (Charmaz, 2006:55). They therefore needed to be “unpacked” in order to understand their meaning and actions and compare them with other data and with emerging categories (Charmaz, 2006:56). This was more easily identified and understood by the researcher, who had adequate exposure to the language (i.e. jargon), abbreviations and meanings of concepts and *in vivo* codes of the strategy consulting practice, which were captured during the interviews.

Table 6.7: Examples of *in vivo* coding during open coding

Quote	<i>In vivo</i> code
"...actually, have an internal platform..."	<i>Platform</i>
"... had an economic SME and then an education SME..."	<i>Subject matter expert</i>
"...and then sort of further massage these..."	<i>Massaging</i>
"...having really unpacking it from all angles..."	<i>Unpacking</i>
"...tool-based-approach, particularly pathfinding, is that you could..."	<i>Pathfinding</i>
"...take the client on a journey"	<i>Journeying</i>

Source: Own data from the study.

6.3.5.2 Focused or selective coding

Once the initial coding phase was completed, the researcher was left with a few possible analytic paths. The next step was to devise codes that would incorporate many of the initial codes in the analysis in order to further guide the researcher on what was the most useful analytic pathway (Charmaz, 2014:138). Therefore, the next phase of coding was moving towards a more focused or selective approach to coding, whereby the most significant or frequent codes deduced in the initial stage of coding were chosen to organise larger amounts of data within the data set (Charmaz, 2006:46). Charmaz (2014:138) argues that if the initial coding stage was done correctly it would have established strong analytic directions, and in this second phase the researcher will synthesise and explain larger segments of the data obtained (Charmaz, 2014:138). This move from the initial coding phase towards a focused coding phase was not an entire linear process - the focused coding phase brought about enlightenment to earlier statements or data (Charmaz, 2006:58). This phase of coding was very concentrated as it required the researcher to become actively involved in understanding and acting upon the codes that were presented – this ultimately determined the strength of the grounded theory categories or concepts that were being developed (Charmaz, 2006:59).

The focused coding process also introduced the comparative process, or constant comparison as a grounded theory strategy. By comparing the initial codes, the researcher was able to focus on the codes with more “analytic power” which enabled the researcher to compare codes with codes and carefully selecting codes that may make promising tentative conceptual categories. This constant comparison also illuminated the direction for the researcher in terms of the theoretical centrality of the analytical ideas that emerged from the

analysis (Charmaz, 2014:140). It should be noted that as with initial coding, focused coding is also an emergent process, and therefore the researcher anticipated that new and unexpected ideas may emerge during this flexible process. Any new conceptualised material was therefore acknowledged and incorporated into the existing analysis (Charmaz, 2014:144-145). Table 6.8 below illustrates the second phase of coding conducted, i.e. focused coding. It illustrates moving from an initial analytical description to a stronger theoretical direction that encompassed several of the initial (open) codes.

Table 6.8: Examples of reducing open codes to focused codes

Quote	Open Code	Focused Code
"...useful tool for ideation workshops"	<i>Ideation workshopping</i>	<i>Facilitating client-team interactions</i>
"...you actually brainstorm the SWOT analysis together"	<i>Brainstorming with client</i>	
"...then we would begin to follow whichever tool we are going to use..."	<i>Introducing to client</i>	
"...ensure that we involve the client and take them alongside..."	<i>Client involved</i>	
"It is also a framework that once pre-populated is a useful conversation tool..."	<i>Conversation tool</i>	
"... they need to be done using specific strategic tools"	<i>Assessing</i>	<i>Applicability of strategy tools</i>
"...the tool itself, for its relevance for the project"	<i>Relevance</i>	
"...might not be applicable for that particular..."	<i>Specificity</i>	
"...for each domain of the core standards"	<i>For specific industry</i>	
"... they have access to reports, data, previous customer information, market related information..."	<i>Organisational documents</i>	<i>Sources used for information gathering</i>
"...one of the things to do is to go previous projects where PESTEL's have been done..."	<i>Previous projects</i>	
"...we had to have an economic SME..."	<i>Subject matter expert</i>	
"...database that exists, we have..."	<i>Databases</i>	
"... we also leverage the client..."	<i>Client</i>	

Source: Own data from the study.

Figure 6.4 below is an extract of one of the interim steps in arranging the codes visually in Excel in order to develop conceptual categories or concepts through applying the grounded theory strategy of constant comparison, and constantly moving back and forth between open and focused coding.

Figure 6.4: Extract: Interim step in arranging codes

STRATEGY TOOLS						
Ownership of strategy tools	Implicit organising infrastructure	Evolving strategy tools	Characteristic nature of strategy tools	Applicability	Facilitate client-team interactions	Facilitate intra-team interactions
Trademarked Preferred Client's tool Stock standard unique to firm internally developed proprietary to organisation well known intellectual property differ across firms traditional effort to develop variety not traditional excerpts from traditional tools created internally tool of choice Specific industry Firm culture Develop own Publicly available	Determining steps Defining structure Frameworks Interpretation Foundation Content development Can be tailored Framework distinct Process Direction Methodology Approach Guidelines Structure using frameworks Structured processes Logical process Guiding framework Scope Clear components Components Elements Processual Mechanisms Tool components Process Tool Components Processes Tool design Tool development Sections storytelling well defined frameworks Infrastructure tool structure determines content information sources time	Traditional Not traditional Excerpts from traditional Evolved old tools Effort to develop Modernised Altering tools New tools tailoring	Similarities Certain characteristics Adding value Intellectual Powerful Practices Advantage theoretically evolved well defined not complete good tool logical thought leadership economic theory Reliant Always used Always Adding value Recommended certain types theoretical explanation	Assessing Scepticism Particular Relevance Specificity Choices applicability versatility for specific industry Type of strategy type dependent	Conversation tool Customer centric selling feature Involve client Brainstorming with client Interacting Client involved Collaborative Co-creating Leading Understanding Guidance Journeying Ideation-workshopping Practices Two-way mechanisms Introducing to client Workshopping output only	Work allocation Resources Team Structure Work allocation (Jnr) Work allocation (Snr) Resource allocation Practices used Reporting Information finding Detailing Guided information gathering Research practices Practices used
BEING EXPERIENCED						
Acts in social setting	Position in organisational setting	Practical nature of work acquired	Presupposed cognitive abilities	Technical skills	Other	
Conversing Dual roles Human behaviour Interviewing	Seniority	Subject Exposure Prior Repetition Replicating Industry Operational Lifecycle Projects Similar work Consulting Not replicating Projects Problem-solving Breadth & Depth Field Sector	Nuances Decision-making Knowledge Intuition Feeling Learning Identifying pattern Makes sense Intuitive Distinguish	Framework Appropriate methodologies Use strategy tools Start with basics Mastering Understanding tools Specific information Problem-solving	Key requirement Vary Outcomes Context Audit firms Direction Outputs Flawed Ambiguous Completeness Defining Important Varying Not qualification Important	

Source: Own document.

6.3.5.3 Theoretical coding

The last stage of coding in the grounded theory process is the concept of *theoretical coding*.

Glaser (1978:72) initially introduced theoretical coding as a way to conceptualise how the substantive codes may relate to each other and also supports the notion of Stern (1980:23) that theoretical coding simply means “applying a variety of analytical schemes to the data to enhance their abstraction”. Theoretical coding, however, remains ambiguous in the sense that it could be either an emergent process or an application. The rationale for theoretical coding is for the researcher to theorise the codes that were established in the development of the analytic story that the researcher is writing, and to help moving this analytic story towards that of a substantive theory (Charmaz, 2014:150).

Charmaz (2006:63) describes theoretical coding as a “sophisticated level of coding” that follows the codes identified as prominent during focused coding. Theoretical codes conceptualise how the substantive codes (core categories) may relate to another as hypotheses, and how these codes could potentially be integrated into a theory (Charmaz, 2006:63). Glaser (1978) presented a series of 18 helpful theoretical coding frameworks that researchers could apply during the process of theoretical coding. Glaser (1978:72) argued that axial coding (as presented by Strauss and Corbin) could be precluded in the coding process as these integrative theoretical code attempt to “weave the fractured story back together” (Charmaz, 2006:63). Theoretical codes should be applied skilfully to the codes that have been determined through focused coding as it has the potential to refine the work of the grounded theorist with a prominent analytic distinction (Charmaz, 2006:63). In the tension that this ambiguous application of theoretical coding creates, Charmaz recommends a researcher draw upon several sources including Glaser’s (1978, 2005) proposed theoretical coding families (both original and contemporary), theories within the discipline of the research and incorporating concepts from other fields. Used in a skilful manner, the application of theoretical coding may give the researcher’s work a sharper analytical edge and clarity provided that a fit between the theoretical codes, the data and the analysis was established (Charmaz, 2014:151).

6.3.6 Memoing

Another distinguishing feature of grounded theory is the grounded theory strategy of memo-writing or shortly referred to as “memoing”. Memoing in grounded theory is concerned with the more formal way in which the researcher captures his or her ideas, questions or

arguments about the data, categories and its dimensions and other hunches or enlightenment about the data during its analyses (Charmaz & Bryant, 2010:410). Memoing prompts the researcher to take an analytic break and write analytic notes that detail various issues throughout the grounded theory research journey. These notes aim to capture the researcher's thoughts, ideas, comparisons and connections and stimulate critical thinking by interrogating the data, the codes and analytic ideas that have emerged throughout the coding process. Memoing forces the researcher to stop for a moment and typically analyse the ideas that he or she might have that occurs at that specific moment in the grounded theory process. Memoing also serves the function of increasing productivity throughout the research and to expedite the analytic work being done (Charmaz, 2014:162). It can bring about new insights or new ideas during the analytical process and makes the work done perhaps more concrete and manageable, and as Charmaz states, perhaps more exciting (2006:72).

Memos are almost always spontaneous rather than mechanical and are mostly for personal use, at first (Charmaz, 2008:80). Charmaz advises the researcher to choose memoing methods that advance thinking, but also spur the researcher to develop ideas throughout the process in narrative form over time (Charmaz, 2006:82). Although memos can remain for private use by the researcher only, memos become an important analytic feature in connecting the coding of the data with the drafting of a more comprehensive theory (Charmaz, 2006:64). By sorting and coding memos, the researcher can give structure to theoretical arguments and provide a framework to explain the development of the analysis and thought generation (Charmaz, 2006).

The use of memoing in this study served a variety of purposes as recommendation by Charmaz and Bryant (2010:410):

- Memoing kept the researcher analytically engaged during analysis of the data by containing notes, ideas and suggestions about areas that were subsequently explored during interviews and analyses,
- Memos captured ideas and arguments about emergent categories to explore the potential of selected focused codes as preliminary categories,
- The memos encouraged the researcher to engage in constant comparison (see paragraph 6.3.5.2) by comparing different interviews or cases,

- The memos were used to create links between the emerging categories and the data that was analysed, and
- The memos ultimately shortened the time between the coding of data and writing first drafts as it served to stimulate thought and structure arguments.

Example #1

MEMO: Reflection on interview #X

From interviewing interviewee #X, I feel that there is almost this notion by strategy consultants that these high-level outcomes of what they think they achieve are far more important than lower-level activities. How do they not know what they do when they work together on a daily basis? Why do they avoid these details and why are they only focused on the higher-level outcomes?

Next interview: ask more detailed questions. Focus on the daily actions. Probe more.

Example #2

MEMO: Coding Interview #X

Line 853: Tools formulate questions! Also understand that they give structure. They enable participation. They dictate the process. (add to others). What do they therefore enable?

Line 873. Explore whether consultants favour traditional tools or own tools.

Line 967. Why is “feedback” so very typical?!

Line 1088: Same team across different tools?

Line 1126: Breaking out of the “mechanical process”?

Line 1221: How are tools linked with consultants, linked with the firm?

Source: Examples from the study.

6.3.7 Initial sampling

The researcher must complete a number of *initial* interviews with appropriately sampled respondents before he or she can engage in any theoretical sampling. This is called initial sampling (Charmaz, 2006:100). Simply put, initial sampling is the point of departure in grounded theory before entering the field, but theoretical sampling will direct the researcher where to go (Charmaz, 2006:100). Initial sampling in grounded theory is not seen as a specific sampling method, rather, it seen as where the researcher needs to “go to obtain the data”(Strauss & Corbin, 1998:201). As per grounded theory guidelines, initial sampling is rather arbitrary and purposive, meaning that the initial participants are chosen for their unique experiences and characteristics (Cooper & Schindler, 2014:152). Initial sampling was

conducted through purposive recruitment of participants in the researcher's professional network, as well as recruitment of participants through the professional online networking platform, LinkedIn. For the purpose of establishing an initial sample, the researcher recruited six initial participants with the inclusion criteria being strategy consultants who have made use of a strategy tool within the last six months during any strategic consulting engagement with a client (i.e. client-facing strategy consultants). In order to develop initial categories to be expanded and refined through theoretical sampling, the first few participants were recruited solely on the inclusion criteria, without consideration of employee level or strategy consulting firm. As the researcher progressed through the initial sampling, sampling became more selective but still arbitrary until six initial participants were interviewed.

It is a requirement in grounded theory for theoretical sampling only to be conducted once the researcher has developed a set of categories (Charmaz & Bryant, 2010:411). Following this point of departure, theoretical sampling becomes emergent, it directs and follows the construction of tentative categories through simultaneous data collection and analysis (Charmaz, 2006:104).

6.3.8 Theoretical sampling

Throughout the process of analysing the data from respondents, researchers may realise that they need specific data to expand on their categories and/or dimensions and would therefore need to seek particular instances in which the phenomena would occur (Charmaz & Bryant, 2010:411). This is referred to as *theoretical sampling* in the grounded theory process, a grounded theory strategy that reinforces the grounding of emergent theory in empirical data (Charmaz & Bryant, 2010:411). Researchers may look to enhance their understanding of the concepts that are prominent in the data and may seek these particular instances or data to explain the phenomenon by returning to their respondents or seek new respondents who could provide data to satisfy their understanding (Remenyi, 2014:3). This process of theoretical sampling gives the researcher's work analytic depth and precision and subsequently focuses on the development of theoretical categories rather than isolated empirical topics (Charmaz, 2006:106). Theoretical sampling may also be used throughout all stages in the research, given that categories exist/have been developed in order to direct this sampling (Charmaz, 2006:107).

The notion of theoretical sampling in grounded theory is sometimes misunderstood or misinterpreted, possibly since the term borrows from the language of quantitative research (Charmaz & Bryant, 2010:411), where sampling represents the purpose of generalisation. The purpose in qualitative research (and more specifically in grounded theory) is not to necessarily represent a whole population, and therefore random sampling would not be required (Remenyi, 2014:14). Theoretical sampling in grounded theory is also merely concerned with conceptual development, and not necessarily about increasing statistical generalisability of results (Charmaz, 2006:101). Sampling in qualitative research differs from sampling in quantitative sampling in the sense that it becomes purposeful or deliberate sampling, with the aim to maximise the depth and therefore value of the data obtained from respondents (Langley, 2014), as in this study. Theoretical sampling in grounded theory is also not the *initial sampling*, which is conducted before the data collection starts (Charmaz & Bryant, 2010:411).

6.3.9 Theoretical saturation

The concept of theoretical saturation (or data saturation) in qualitative research is also used and applied in the grounded theory process (Remenyi, 2014:15). It aims to answer the question: “when do I stop gathering data?” (Charmaz, 2014:213). Theoretical saturation occurs when the researcher does not find any new facts or ideas from subsequent interviewees in order to saturate the categories that have been developed (Charmaz, 2014:213; Remenyi, 2014:15). Theoretical saturation, therefore, indicates the point where new data does not reveal any new properties of the core theoretical categories (Charmaz, 2014:213). Theoretical saturation is unfortunately not possible to determine *a priori*, as the amount of data that will be needed is guided by the development of categories and their saturation (Charmaz, 2006:113), among other considerations.

The logical answer to the point of theoretical saturation in grounded theory though, is that data or theoretical saturation is obtained when core categories identified reveal no new properties or spark no new theoretical insights (Charmaz, 2006:113). It should be noted that theoretical saturation in grounded theory does not relate to witnessing or identifying repetitive events, actions or statements (Charmaz, 2006:113). Glaser (2001:191) mentions

that theoretical saturation in grounded theory is concerned with the conceptualisation of comparisons of these repetitive events that have different properties or dimensions to the events. Theoretical saturation therefore remains a key criterion in grounded theory logic – the researcher should only stop sampling in the event that core categories have become saturated (Charmaz, 2006:114). Grounded theorists such as Mason (2010) and Bowen (2008) contend that the number of interviews does not matter in grounded theory, as a few interviews could produce a more significant analysis if theoretical sampling has been correctly employed (Charmaz, 2014:214).

Although there is no definitive number in theoretical saturation, for Doctoral studies using a grounded theory methodology, only two sources exist which provide *guidelines* for actual sample sizes. Mason (2010) exhibits the range of participants through a comparison of 174 Doctoral studies making use of a grounded theory methodology: the range of participants varied from 4 to 87 with a mode (most frequent number of participants) being 25. However, Mason (2010) argues that the notion of theoretical saturation – specifically in the context of the Doctoral study – has a number of practical weaknesses, mostly concerned with the time and resources available to the Doctoral student and the practical implications and constraints in the tertiary environment. Strauss and Corbin (1990:292) states explicitly: **"Sometimes the researcher has no choice and must settle for a theoretical scheme that is less developed than desired"**.

Taking into consideration the practical implications and resource constraints of this study, including (but not limited to) the time available to complete the study and access to highly specialised participants, only 11 participants could be interviewed. Theoretical saturation in the context of the grounded theory methodology was pursued in all practical ways possible.

6.3.10 Theoretical sensitivity

Theoretical sensitivity stems from Glaser and Strauss's (1967) original grounded theory work and is often referred to as the heart of theory generation (Remenyi, 2014:28). According to Hallberg (2006:144), theoretical sensitivity is a concept whereby the researcher uses both professional and personal experiences in addition to an acquired methodological knowledge in order to analyse and interpret data in new ways to think abstractly about the

theory that is being developed. Theoretical sensitivity is an important, yet challenging feature in the grounded theory process.

As Remenyi (2014:28) describes, theory generation requires experience and vivid imagination, and from the researcher especially the ability to self-critique the process(es) and theory, as well as a higher level of intellectual maturity. Grounded theory specifically requires a high level of interpersonal skills and personal openness from the researcher (Remenyi, 2014:28), complemented by reflexivity, i.e. the ability of the researcher to critically reflect on how his/her perspective and researcher-participant interaction might affect the process of analysis and therefore the forthcoming results (Hallberg, 2006:144). From a more pragmatic perspective, theoretical sensitivity can also be interpreted as the way in which a researcher manipulates, in order to explain the data obtained in a way that best reflects the reality of the phenomenon (Hallberg, 2006:144). There are, however, a few key things that should earn consideration in theoretical sensitivity of a researcher. The researcher should remain aware of biases through pre-conceived knowledge, beliefs and assumptions by delving too deeply into existing literature, as this could become problematic (Remenyi, 2014:29).

6.4 QUALITY AND RIGOUR OF THE RESEARCH

6.4.1 Errors and bias

It must be recognised that several errors can occur during the entire research process. Cooper and Schindler (2006:246-52) identify a number of errors and group them into interviewer error and participant error. The interviewer errors as proposed by Cooper and Schindler (2006) are listed in Table 6.9 together with the appropriate mitigation strategy that was employed throughout this study.

Table 6.9: Mitigation for interviewer errors

Interviewer Error	Mitigation strategy employed
Failure to secure full participant cooperation (sampling error)	The researcher stressed the importance of the interview and its data for the success of the research project. The researcher did not use senior/executive management influence to effect compliance and participants participated voluntarily with informed consent.

Interviewer Error	Mitigation strategy employed
Failure to record answers accurately and completely (data entry error)	The researcher used a dictaphone plus a backup dictaphone to ensure that all interviews were recorded in an appropriate manner. Transcripts were also made available to participants who opted to review the transcript for accuracy. All transcripts were examined for quality and accuracy against the original audio after initial transcription.
Failure to consistently execute interview procedures	To enhance consistency in interview procedures, all interviews were conducted by the primary researcher only. In the one instance where it was not possible for the primary researcher to conduct the interview in person or via teleconferencing, a semi-structured questionnaire with open-ended questions was supplied to the participant. The researcher analysed the questionnaire in the same manner as all other transcripts.
Failure to establish appropriate interview environment	To reduce the error in establishing appropriate interview environments, the researcher conducted all interviews in a setting that was familiar to the interviewee and at a time that was convenient to both interviewee and interviewer. The researcher aimed to eliminate or reduced noise, interruptions or other disturbances during interviews.
Falsification of individual answers or whole interviews	To minimise the falsification of individual answers or whole interviews, the researcher did not employ any fieldworker but conducted all interviews personally.
Inappropriate influencing behaviour	The researcher aimed to minimise any influence of interviewees by limiting suggestions, using the correct tone of voice, using appropriate body language and minimising non-verbal signs.
Physical presence bias	As interviewers could sometimes be perceived as either authoritative or inferior figures, the researcher aimed to establish some personal rapport with the interviewee in a professional way before the interviews were conducted. By establishing professional rapport and conversation via the online professional networking platform LinkedIn, the researcher minimised the perceived social distance between interviewer and interviewee and minimised the physical presence bias during interviews by conducting intensive interviewing, but in a more relaxed and informal conversational manner.

Source: Adapted from Cooper & Schindler (2006:246-249).

Cooper and Schindler (2006) suggests that there are three conditions for successful participant interaction during an interview. These conditions together with their enabling strategy are listed in Table 6.10 below.

Table 6.10: Strategies for successful participant interaction

Condition	Strategy employed
The participant must be knowledgeable or possess the information relating to the questions asked.	The researcher ensured the selection of appropriate participants by establishing specific inclusion and exclusion criteria, and only approaching potential participants that were deemed suitable for participation within this study.
The participant should understand the importance of his/her role in providing accurate information to the interviewer.	Each interviewee was made aware of the importance of his/her role in providing accurate information through means of both an informed consent form (which stated the importance of both

Condition	Strategy employed
	the research and the participant's contribution), followed by a brief, informal explanation of the research and its importance in both the academic and organisational field.
The participant must be willing to cooperate for the entire interview.	All participants cooperated for the entire interview as the researcher skilfully conducted the intensive interviewing in a manner that enabled the participant to contribute, rather than comply.

Source: Adapted from Cooper & Schindler (2006:249).

Cooper and Schindler (2006:249) also argue that interviewees could cause errors in two major ways: their willingness to respond and their quality of response. The mitigation strategies for interviewee or participant errors are listed in Table 6.11 below.

Table 6.11: Mitigation for interviewee errors

Participant Error	Mitigation strategy
Participation-based errors	This type of error refers to the overall perception that the participant might have of the interview. If a participant feels that an interview is not pleasant, that his or her participation is not important and has any mental reservations about participation in the interview, participation-based errors could occur. To minimise participation-based errors, the interviewer employed behaviour that revealed confidence and exhibited an engaging personal style. The interviewer explained the purpose of the study and addressed any concerns participants had beforehand, so that the participant could understand the value and meaning of the interview. The interviewer also motivated participants to the maximum extent by allowing participants to also reflect on their own situations and work.
Response-based errors	Response-based errors occur when participants give incorrect answers or incomplete answers. It must be recognised that the interviewer had no control over the level of knowledge of the participant but aimed to maximise response and probed the participants to share answers that might be otherwise hidden. On issues where participants seemed neutral or had no opinion, the interviewer aimed to probe for the participant's true position on or description of certain issues to increase the reliability and validity of the data.

Source: Adapted from Cooper & Schindler (2006:249-252)

6.4.2 Quality criteria for grounded theory studies

Remenyi (2014:16,33) argues that the quality of grounded theory research stems from notions such as adequate and critical reflection on the research and the extent to which trustworthiness and transferability has been created by a higher level of abstraction. Hallberg (2006:144) mentions that grounded theory studies should be evaluated in terms of its fit, work, relevance and modifiability. Other dimensions of quality that should be

considered is the trustworthiness of the study and the concordance between the data and the results. As the strategy of theoretical sampling in grounded theory bears the characteristics of triangulation (Remenyi, 2014:14), the only other attempt to triangulation can be conducted via respondent validation, therefore allowing the participants of the study to judge the applicability, reasonableness or “fit” of the results in its empirical setting (Hallberg, 2006:144). Charmaz (2014:337-338) outlines perhaps the most useful criteria for grounded theory studies that are significant for this study, and which were subsequently adopted to pursue quality. These criteria that pursue quality and rigour of the research are listed in Table 6.12 below.

Table 6.12: Quality Criteria for Grounded Theory Studies

Criteria for Grounded Theory Studies
Credibility
<ul style="list-style-type: none"> • Has your research achieved intimate familiarity with the setting or topic? • Is the data sufficient to merit your claims? Consider the range, number and depth of observations contained in the data. • Have you made systematic comparisons between observations and between categories? • Do the categories cover a wide range of empirical observations? • Are there strong logical links between the gathered data and your argument and analysis? • Has your research provided enough evidence for you claims to allow the reader to form an independent assessment – and <i>agree</i> with your claims?
Originality
<ul style="list-style-type: none"> • Are your categories fresh? Do they offer new insights? • Does your analysis provide a new conceptual rendering of the data? • What is the social and theoretical significance of this work? • How does your grounded theory challenge, extend, or refine current ideas, concepts and practices?
Resonance
<ul style="list-style-type: none"> • Do the categories portray the fullness of the studied experience? • Have you revealed both liminal and unstable taken-for-granted meanings? • Have you drawn links between larger collectives or institutions and individual lives, when the data so indicate? • Does your grounded theory make sense to your participants or people who share their circumstances? Does your analysis offer them deeper insights about their lives and worlds?
Usefulness
<ul style="list-style-type: none"> • Does your analysis offer interpretations that people can use in their every-day worlds? • Do your analytic categories suggest any generic processes? • If so, have you examined these generic processes for tacit implications? • Can the analysis spark further research in other substantive areas? • How does your work contribute to knowledge? How does it contribute to making a better world?

Source: Charmaz (2014:337-338)

6.5 RESEARCH ETHICS

According to Cooper and Schindler (2014:28), ethics are those norms or the standards of behaviour that guide our moral choices about our behaviour and that guide our relationships with others. Since there are no general agreements to ethical issues because of different societal norms (Zikmund, 2003:75), it is necessary to adopt generally accepted codes of ethics – a list of guidelines that steer research conduct (Saunders *et al.*, 2011:228).

Many disciplines require the use of human subjects when conducting research (Leedy & Ormrod, 2005:101). It is therefore important to consider certain ethical implications that might be imposed on humans whenever research is conducted. For this study it was no different as the subjects were human, and the study was concerned with these humans' behaviour. The primary goal of ethics in research is to minimise any potential harm that could occur to these human subjects as they participate in the research (Cooper & Schindler, 2014:28). This is no different to research within the strategy as practice domain, where the reporting of results is affected by the need for confidentiality and higher degree protection from harm, specifically for those professional strategy consultants who trustingly and willingly gave their time and assistance for this research (Johnson *et al.*, 2007:71).

What further distinguishes this study from other studies in the economic and management sciences, is its inter-disciplinary nature between the management sciences and the social sciences. Therefore, the study needed to adapt more pragmatic guiding principles for research ethics that pertain to the social sciences as opposed to the management sciences. In line with principles such as those suggested by The Economic and Social Research Council (ESRC) in the United Kingdom (2019), ethical research practices that were specifically prioritised were:

- Obtaining informed consent of participants,
- Ensuring the confidentiality and anonymity of participants and respecting rights and dignity of individuals,
- Seeking voluntary participation in the study,
- Conducting research with integrity and transparency,
- Ensuring avoidance of harm during the study, and
- Emphasising independence and impartiality of the researcher to avoid conflict of interest.

Of particular importance for ethical research in the broader social sciences, was the informed consent form that all participants had to acknowledge and sign as acknowledgement thereof. The consent form that was developed and attached as Appendix A, contains the following elements:

- It described the purpose of the research to the participant in plain language, and presented opportunity for elaboration or clarification,
- It ensured the anonymity of the participant and confidentiality of information elicited during the interview, and
- The informed consent form explained the rights of the participants and their right to withdraw at any time without any negative consequences.

Table 6.13 below contains a summarised list of relevant ethical principles or ethical guidelines, and how these principles were incorporated throughout this study.

Table 6.13: Ethical principles and their adoption within the study

Ethical Principle	Adoption within the study
Integrity and objectivity of the researcher during the entire research process	The researcher aimed to ensure objectivity throughout the study by avoiding dishonesty.
Avoidance of harm (non-maleficence)	The research was designed to ensure that there were no risks to the emotional wellbeing, mental or physical health of any respondent or stakeholder. The researcher did not employ any method that could be seen as intrusive or could cause any anxiety or stress among respondents.
Respect for others	The rights and privileges of all respondents and other stakeholders during the research process were recognised and respected throughout.
Privacy of respondents/interviewees	The privacy of all participants for the study are extremely important. Interview transcripts and sensitive documents were sensitised, and transcripts were only viewed by participants themselves.
Voluntary nature of participation and right to withdraw	All respondents agreed to voluntarily take part in the research and indicated that they understood the implications of their participation through signing an informed consent form before participation. Interviewees were also able to withdraw their consent at any time during the research process.
Ensuring confidentiality of data and maintenance of anonymity of respondents	Confidentiality and anonymity were of extreme importance during the entire research process, as this increased the reliability of the data gathered. All data was handled as confidential.
Responsibility in the analysis of data and reporting of findings	The researcher ensured that all primary data that was collected is truthful and was not altered during any stage of collection or analysis. The findings are represented as accurately as possible irrespective of the expected outcomes.
Compliance in the management of data	The researcher did not collect any personal data that was not of importance to the proposed study. Names and contact particulars were recorded only for participant verification by the study supervisor and is kept in a secure location. No additional personal data was recorded from respondents in response to the anonymity of participants and confidentiality of transcripts.
Ensuring the safety of the researcher	The research design acknowledged the associated risks to the researcher. The researcher mitigated any apparent risks through appropriate mitigation strategies before, during and after the data collection.

Source: Adapted from Saunders *et al.* (2012:232); Greener (2011:142-156).

In order to abide by the codes of ethics as required by the University of Pretoria, informed consent was needed from all participants and interviewees to enable the researcher to conduct the necessary interviews and access documents. The informed consent letter is attached to this document as Appendix A. The study underwent the necessary scrutiny and procedures for ethical clearance from the Research Ethics Committee of the Faculty of Economic and Management Sciences at University of Pretoria and is attached to this document as Appendix C.

CHAPTER 7: QUALITATIVE FINDINGS

The study is concerned with the role of the strategy consultant as external strategist to the organisation, and explores the interplay between consultants and their use of strategy tools in their daily practice of strategising during a strategy consulting engagement. Acknowledging that very little research exists within the strategy as practice domain that could offer empirical or theoretical insight into the relationship consultants have with the strategy tools they use in practice; the study sets out to generate theory that extends and builds on existing theory in the practice domain. With strategy as practice providing a micro-level perspective on the daily activities, tasks and behaviour of strategists during the doing of strategy (strategising), it allows for the discovery of actions and interactions between consultants themselves and the materials that are used in practice. Adopting a grounded theory perspective assisted in theory building to help explain a phenomenon for which very little literature or theory is currently available. Specifically employing grounded theory strategies such as coding, constant comparison and theoretical sampling to develop core concepts or categories contributed to generating theory in order to understand this much under-researched phenomenon.

The aim of this chapter is to systematically introduce the most applicable and prominent core (grounded theory) categories and their properties or dimensions, as it developed gradually from the analysis of the empirical data acquired through intensive interviewing. By following appropriate grounded theory strategies such as an iterative abstraction from line-by-line analysis to open codes and subsequently focused codes, the researcher was able to deduce five grounded theory categories that could further illuminate our understanding of the interplay between consultants and their use of strategy tools during a strategy consulting engagement. This chapter commences with an overview of the interviewing process (as discussed in chapter 6) before introducing each of the five grounded theory categories that were deemed to be the most prominent, and most applicable in explaining the phenomenon studied.

7.1 INTERVIEWING PROCESS

The data collection phase of this study can broadly be characterised by two stages of the

data collection, namely the initial interviewing of six strategy consultants (within the context of interviewing and data generation, subsequently referred to as participants), and subsequent interviewing of another five strategy consultants based on theoretical sampling and refining these core categories and their properties and/or dimensions. The study started with the intensive interviewing of six strategy consultants¹⁶ who voluntarily participated in the study. In line with the grounded theory methodology that was followed, this intensive interviewing of consultants employed more flexible interviewing guidelines as proposed by grounded theorist Charmaz (2014:56), rather than adopting standardised prescriptions as the case would be within other qualitative methodologies. Charmaz (2014:56) suggests a “gently-guided” conversation (see paragraph 6.3.4) in order to explore the consultant’s experience related to the research topic, elaborating on the phenomenon and probing answers where appropriate. The focus of the initial interviewing phase was to obtain as much detail and data as possible from consultants within all practical, personal and cognitive limitations. The first three interviews were conducted in a semi-structured, but more informal and conversational manner within which the researcher was able to gauge the extent of the consultant’s implicit and explicit knowledge on the topic area, the timespan of cognitive recollections within the consulting practice, the extent to which the consultant could explain actions and interactions during specific periods of their strategy work, the language the consultant employed in describing their daily strategy work and their broader consulting engagements, and other similar notions that were deemed important to pursue the research objectives. In informally delineating the theoretical span of interviews, the researcher was able to anticipate the remainder of the consultant’s recollection of activities and practices and to structure interviews in a manner for conceptual categories to emerge much faster and more prominently, than would be the case in a broader *Glaserian* grounded theory approach. This relates to the “forcing of theory” as described by Onions (2006) in adopting a *Straussian* approach to grounded theory (see paragraph 6.3.2). The remainder of the intensive interviews therefore followed a more structured approach to interviewing, yielding in-depth, rich empirical data that is used to discuss and describe the emergent core categories.

It should be noted that, although the classic grounded theory methodology calls for a comprehensive literature review to be conducted only after data collection, the *Straussian*

¹⁶ Subsequently referred to as “consultant”.

approach to grounded theory as well as the practical nature of the study (i.e. doctoral thesis with severe practical limitations) allowed the researcher to have a general idea of the research topic/area of inquiry before the initial interviewing started. It should also be acknowledged at this point, that the researcher, as a professional in the strategy consulting field, had fairly broad knowledge of the strategy consulting environment. The researcher, however, followed the premises of grounded theory by temporarily setting aside any preconceived theoretical concepts, notions, understandings and assumptions that could potentially have influenced the data analysis. This experiential hunch allowed the researcher to steer the interviewing process while keeping theoretical focus and pursuing empirical evidence of the phenomenon in practice. After the initial six interviews had been conducted, the researcher started to conduct the literature review in an attempt to systematically review and incorporate appropriate literature that could potentially assist in the theoretical analysis and discussion of the findings. The parallel literature review also allowed for subsequent focused interviewing and analysis with the aim of analytically sharpening and refining the emerging core categories along with their associated properties and dimensions.

7.2 CATEGORY 1: A DEFINITION OF CONSULTING

During the initial interviewing phase, through informal conversing about the work of consultants as strategy practitioners and the nature thereof, participants deliberately and continuously referred to the word *consulting* or *strategy consulting* or *management consulting* during their interviews. Though the term consulting has diffused throughout various industries to describe services of advisory nature, the word consulting within this context is commonly referred to as the practice of management consulting, of which strategy consulting forms a subset (also see paragraph 1.1).

Firstly, consultants continuously referred to their daily doing of strategy work as *consulting*, as opposed to *strategising*, by referring to this consulting practice through ways such as “do within consulting”, “looking to move into consulting” or “at firm X’s management consulting”. The use of consulting was also employed to refer to the consultant’s line function as strategy consultant within the consulting organisation¹⁷ they were employed in (“I went straight into

¹⁷ Also referred to as consulting firm.

consulting at firm X”). Consultants also referred to consulting in a broader context, making reference to consulting as an institutionalised practice that is embodied through an industry of consultants as well as its professional capacity, by using phrases such as “people from the consulting side”, “strategy consulting space” and “looking to move into consulting”. Moving away from the more economic and institutional definitions of strategy consulting as a professional service with an institutionalised industry and practices, the word consulting was also used to describe the nature of their work as a specific subject matter at hand, making reference to the act, the discourse and the broader fields of strategy consulting as an industry, e.g. “if you talk consulting”. Lastly, consulting was used to describe the specific strategic episode during which consultants would engage with another party for the provision of professional strategy consulting services, e.g. “the people side from a consulting engagement”. These four contextual dimensions of consulting as *a function, an industry, a subject or an engagement* are summarised in Table 7.1 below. The table illustrates how the quotes were coded line-by-line to deduce open codes (during open coding as explained in paragraph 6.3.5.1), which were then incorporated and abstracted into the more prominent categories or *focused* codes (during focused coding as explained in paragraph 6.3.5.2). Within the grounded theory coding approach (see paragraph 6.3.5), the most abstract codes represent the category whilst the level of codes below represent the dimensions or properties of the category, developed through the process of constant comparison.

Table 7.1: Category 1: A definition of consulting

Focused Code	Open Codes	Examples of Quotes
Consulting	A function	“any piece of work you do within consulting”, “I know the team I sat in, the strategy team at firm X management consulting”, “lead by the consulting team”, “and I went straight into consulting at firm X”
	An industry	“some people from the consulting side enjoy”, “the consulting organisation”, “started working in the strategy consulting space”, “I was looking to move into consulting”
	A subject	“if you talk consulting”
	An engagement	“the people side from a consulting engagement”

Source: Own data from the study.

7.3 CATEGORY 2: THE PROFESSIONAL IDENTITY OF THE CONSULTANT IN PRACTICE

In pursuit of the definition of strategy consulting as an engagement, the interviews explored the understanding of what this strategy consulting engagement entails in practice. As the practitioner of strategy is foregrounded (i.e. the more prominent element) in the strategy as practice perspective, the interviews continued to focus on the daily doings of the consultant during a strategy consulting engagement, and how consultants perceived themselves during this consulting engagement. The data collection phase centred heavily around conversing, questioning and understanding what the consultant does during a *regular* day of strategy consulting during a consulting engagement. The guided interviewing of consultants therefore leaned towards exploring the notion and nature of strategy consulting in order to understand how consultants perceive and enact the practice of strategy consulting within its broader context. It explored the activities and nature of the consulting work by allowing and encouraging consultants to gauge *who* they are and *what* they think they do as consultants. During the simultaneous collection and analysis of interview data, the identity of the consultant as a professional in strategy practice started to emerge, defined by four dimensions that constitute the identity of the strategy consulting professional in practice.

The properties (or focused codes) that constitute this category of the professional identity of the consultant in practice are:

- the notion of a consultant's *metaphorical proximity* to a client;
- the perceived *superior professional status* of the consultant,
- the *role hierarchy* of consultants that constitute consulting teams and firms; and
- the *distinguishable skills* that consultants deem necessary to enact consulting in practice.

These properties are summarised below in Table 7.2 which indicates how the properties of this category were derived through employing the two main phases of coding in grounded theory, namely open coding and focused coding.

Table 7.2: Category 2: The professional identity of the consultant in practice

Focused Code	Open Codes	Examples of Quotes
Metaphorical proximity	External to organisation	“come into the business to assist”, “external to the organisation”, “more around being a business partner”
	Temporal engagement	“over a shorter period of time”, “process in bringing said members into the organisation”, “through your normal tender”, “since then I have contracted”, “force yourself to engage”, “in an engagement from our firm”, “they may be engaged”
	Defined scope of work	“we have this piece of work that can assist you”, “consult on the thinking phases”, “select...the ideal areas”
Superior professional status	Distinct personality	“Firm X has a very clear style”, “they have this very clear ... thing”, “always an element of bias”, “people of a set personality”
	Diverse background	“strategy”, “development”, “finance”, “economics”, “may have different backgrounds”, “diverse thinking”
	Superiority	“you cannot replicate it”, “there is a calibre that is expected”, “because you have done good work”, “work ethic needs to be impeccable”, “the association is that you are really smart people...”, “this person actually knows how X works”
	Professional networks	“Through their relationships”, “where prior the partner had a connection”, “who you have connections with”
	Advisory role	“lot of time doing thought leadership”, “helps the company decide”, “might actually advice on a course of action”, “what’s good and what’s not”, “defining the direction”, “mapping out a blue-print”, “so the will ask, have you...”, “gauge what the outcome will be”, “given to the leadership to provide... guidance”, “a point of direction”, “it accurately gives direction”, “are we moving in the right direction”, “you need to be a flexible thinker”, “thought leadership”, “to give them that proper insight”, “generate some insights”, “required to have leadership”
	Methodical rigidity	“ a little bit more concise”, “how the engagements work...”, “a little bit more methodical”, “is that they are rigid”, “rigour associated with what we do”, “it is a very structured thing”
	Superior problem-solving abilities	“challenging to engage in an environment such as ours”, “comfortableness with complexity”, “wrangle with the unknown”, “you got very tight deadlines”, “ability to simplify the complex”
	Outcome oriented	“in a long-term context”, “simplify the complex”, “create a manageable path”, “in

Focused Code	Open Codes	Examples of Quotes
		order to achieve their desired outcomes”, “these are what we call the landmarks we need to reach along the process”
	Knowledge	“focus on a particular industry”, “I was in the management consulting space”, “decided to focus on a particular topic”. “someone there who is a subject matter expert”
Role hierarchy	Hierarchical	“but very hierarchical”, “yes, an explicit hierarchy?”, “hierarchy is definitely key”, “five consultants across varying levels”, “a principal consultant”, “an analyst”, “a consultant”, “senior consultant”, “manager”, “partner”, “the partner giving oversight”
	Expectations	“know where you fit in”, “you are meant to do what is expected of you”, “you are kind of told where you sit”
Distinguishable Skills	Quantitative	“good quantitative skills”, “being good at numbers”,
	Interpersonal	“being good with people”, “the people side from a consulting engagement is key”. “strengths is building relationships”, “helpful to have a team with good interpersonal skills”, “interpersonal relationships”
	Education & Training	“young graduate”, “skills that are required was mainly formal training”, “you need some relevant postgraduate qualification
	Cognitive Abilities	“critical thinking is probably most important”, “generate some insights”, “innovative thought leadership thinking”

Source: Own data from the study.

7.3.1 Metaphorical proximity to client

Throughout the data collection phase, participants continuously referred to the *client* as the organisational entity for whom professional consulting services are delivered during the strategic engagement. This definition of *client*¹⁸ incorporates the entire organisational entity, the specific individuals, teams or communities in the organisation with whom they interact during the consulting engagement, as well as other stakeholders that might be directly or indirectly involved in the consulting engagement, or are impacted by the outcomes of the consulting engagement. The notion of *metaphorical proximity* emerged during data analysis through abstraction of open codes which suggested that this proximity to a client

¹⁸ This all-encompassing definition of client is adopted for the remainder of the study.

incorporates a spatial separation (or distance) and a more metaphorical position of the consultant to the client. Firstly, the open code of *external to organisation* describes how consultants perceived themselves as spatially (physically and conceptually) external to the client (“external to the organisation”). They see this external position as being dynamic rather than static, in that it can be altered through *temporal engagement* (“over a shorter period of time” and “process in bringing said members into the organisation”). This temporal engagement is signalled by factors such as the existence of predetermined negotiations and agreements that functionally enables this temporal engagement between consultant and client. The temporal engagement ends by achieving pre-defined and agreed upon outcomes (“understanding what is required”) that are usually determined before the onset of the agreement (“obviously there was a brief by the client”). The rules, guidelines and outcomes of this engagement is described by consultants as being encompassed through the *defined scope of work* (“we have this piece of work that can assist you”, “consult on the thinking phases” and “select...the ideal areas”). Together, these open codes suggest that conceptually, the consultant’s position in relation to the client may change through establishing certain rules and agreements that govern the change in proximity of the consultant to the client. The theoretical argument for the use of *metaphorical proximity* and its relation to existing theory, is presented in paragraph 8.4. However, the concept is included within this chapter as the grounded theory process allows for alteration of earlier codes as and when new understanding or sensemaking emerges from theoretical analysis in subsequent coding processes.

7.3.2 Professional status

Consultants perceived their professional identities as consultants as highly ascribed by the consulting firm in which they are employed, relating this identity to concepts such as firm culture, affinity toward colleagues, organisational relationships and the *way of doing things* within their consulting firm.

The following dimension of perceived *superior professional status* as it pertains to the identity of the consultant, relates to how consultants described the typical South African consultant as strategy professional in practice and the work they do on a daily basis during

a consulting engagement. The dimension of professional status as fleshed out during the interviews was derived from ideas such as:

- The distinct personality of the consultant (*distinct personality*),
- The diversity of the profession in a South African context (*diverse backgrounds*),
- The perceived status in relation to clients (*superiority*),
- The professional networks the consultant develops and possesses (*professional networks*),
- The advisory role of the consultant (*advisory role*),
- The methodical rigidity the consultant employs as a distinguishable element in strategy consulting (*methodical rigidity*),
- The consultant's perceived superior abilities to solve problems in ambiguous and complex environments (*superior problem-solving abilities*),
- The orientation to achieve specific outcomes for the client (*outcomes oriented*), and
- The distinguishable subject knowledge consultants are believed to have (*knowledge*) in relation to the client which contracts the consulting firm or consultant.

Most consultants mentioned that they can identify the general consultant as a professional with distinct personality ("people with a set personality"). This was an interesting answer for the researcher, as most of the consultants described the general South African strategy consultant to hail from various (e.g. "strategy", "development", "finance" and "economics") and diverse backgrounds ("may have different backgrounds"). Consultants further mentioned that these diverse backgrounds consisted of different cultural, educational and social settings, which brings about multi-disciplinary approaches, thinking and values to the strategy consulting firm ("diverse thinking" and "educational perspective ... cultural perspective ... religious perspective"). Therefore, the researcher probed several consultants to understand what the common denominators were for identifying the general strategy consultant. With reference to the description of the consultant to be diverse in approach, thinking and values, most consultants had a common description of the consultant as a professional of superior status ("association is that you are really smart people") in the business environment and therefore several expectations to which the consultant should conform to exist ("there is a calibre that is expected" and "work ethic needs to be impeccable"). Consultants also described consultants as individuals with strong professional relationships ("through their relationships"), where this strong relational element

(“formulating that client relationship”) seems to play an integral part in the professional status of the consultant, embodying some sort of stability and development where these stronger professional networks exist. This relational element seems to influence both the status of the consultant and the ability of the consultant or consulting firm to generate new strategy consulting business (“where prior the partner had a connection”) and expand on its current professional network. Another prominent property of *superior professional status* relates to the advisory role that participants believed consultants perform in their daily activities during a consulting engagement. This advisory role may be embodied through several actions or dimensions, from providing guidance (“given to the leadership to provide... guidance”), influencing strategic outcomes (“defining the direction” and “lot of time doing thought leadership”), aiding in strategic decision making (“might actually advise on a course of action” and “helps the company decide”) and even legitimising decisions that might be made by executive management in organisations (“what’s good and what’s not”), purely through their status as seemingly credible advisors to the organisational entity.

Characteristic to the strategy consulting profession, consultants are furthermore known to employ a high degree of methodical rigidity (“a little bit more methodical” and “rigour associated with what we do”) in their consulting work, which leads to the next property constituting a superior professional status. Strategy consultants conform to what can be understood as institutionalised methodical rigidity (“how the engagements work” and “it is a very structured thing”) in their approach to strategy consulting work. This methodical rigidity can furthermore even be conceptualised as a mechanism or practice that aids in the legitimisation of organisational decisions during the consulting engagement. The next property of superior professional status relates to the perceived superior problem-solving abilities of the general consultant. Not only are consultants expected to exert a certain level of “comfortableness with complexity” whilst they “wrangle with the unknown” or are “wrestling with the problem”, but they are also expected to solve complex organisational issues that influence strategic direction within typically short timeframes, as consultants mentioned “you got very tight deadlines”. Consultants perceived this complexity of problem-solving within short timeframes as constituting a relatively daunting and challenging work environment for consultants (“challenging to engage in an environment such as ours”) which enforces the perceived status of consultants as superior, trusted business advisors. The last property of professional status relates to consultants’ conception that consultants

demonstrate superior knowledge within the contextual environments in which they operate, that can relate to a high perceived value by their clients. This knowledge may represent specific knowledge within a particular industry (“focus on a particular industry”) or specific problematic subject (“focus on a particular topic”) or merely the strategy consulting firm’s typical access to specialised expertise through its professional network of knowledgeable, highly specialised individuals, commonly referred to in consulting as subject matter experts (“someone there who is a subject matter expert”).

7.3.3 Role hierarchy

The next dimension that constitutes the professional identity of the consultant in professional practice relates to the way the organisational environment of consultants in their respective consulting firms are constructed and managed through diffusion of social norms and conformity, particularly relating to the effects of the typical institutionalised hierarchy that is very characteristic of the strategy consulting industry. Consultants described the positions of consultants in teams as an imitation of the typical hierarchy that exists in the strategy consulting firm (“yes, an explicit hierarchy”). This typical hierarchy of consulting firms can be abstracted to three hierarchical levels, with the more junior consultant or analyst at the lowest level, the more senior consultant or manager above the lowest level and the firm partner or executive at the top of the hierarchy, in a similar notion to the representation by Alvesson and Kärreman (2007:714).

Participants described the typical levels of consultants in strategy consulting firms as “an analyst”, “a consultant”, “a senior consultant”, “manager”, “partner” or “director”, which can be structured accordingly into the hierarchical levels of consultant, manager and partner. Consultants mentioned that this replication of consulting firm structure (“five consultants across varying levels”) and the explicit hierarchy is a key feature of how consultants organise their consulting engagements and daily work (“hierarchy is definitely key”), according to the expectations and responsibilities that exist for each level of consultant (“you know where you fit in”, “you are meant to do what is expected of you” and “you are kind of told where you sit”). With consultants mentioning that consultants understand what is expected from them during a consulting engagement, together with an understanding of how these roles are to be enacted, most consultants displayed an inclination to naturally perform specific activities

during the engagement (“junior members who might be tasked with research phase” and “director plays a very key role ... coaches team”, “a mentoring process” and “acting as a mentor more than anything else”). Although the members of the consulting team then act according to the organisational expectations of the consulting firm, it seems that this role hierarchy enhances the perceived professional status of the consulting team.

7.3.4 Distinguishable skills

The last dimension that constitutes the professional status of the consultant in practice relates to the distinguishable skill set the consultant possesses and employs in practice during the consulting engagement, whether natural abilities or acquired skills. These skills are encompassed in the properties of *quantitative skills, interpersonal skills, education and training and cognitive abilities*.

The first type of essential skill set relates to the possession of appropriate quantitative skills, or as participants mentioned “being good at numbers”. Quantitative skills are deemed important for the successful completion of certain tasks and activities during information finding and analyses of strategic information, particularly pertaining to intensive mathematical and statistical activities throughout the consulting engagement (“there is a lot of data and number crunching that needs to happen” and “good at Excel typically ... lot of analyses to do within that”). Consultants also described good consultants to possess superior interpersonal skills. The notion of interpersonal skills seems to be multi-dimensional as it relates to interpersonal skills within teams (“helpful to have a team with good interpersonal skills”) as well as across teams and relational or organisational boundaries (“strengths is building relationships”, “interpersonal relationships” and “good working relationships”). The property of education and training relates to the specific skillset acquired through formal education and development that could have not been acquired otherwise (“skills that are required was mainly formal training” and “you need some relevant postgraduate qualification”). The last set of essential skills consultants view as critical for any consultant to have is the possession of certain cognitive abilities (“critical thinking is probably the most important component “ and “I find, with strategic work, you always have to think about this, and how, and why”), which manifests through various ways or dimensions such as innovative thinking in strategy work (“innovative thought leadership thinking”),

driving strategic insights through activities such as examining and analysing of strategic information (“generate some insights”) and constantly challenging conventional approaches to strategy development (“challenge it” and “continuously challenged to think better”).

7.4 CATEGORY 3: CHOOSING STRATEGY TOOLS

The next emerging category during data collection and analysis centred around the criteria that consultants inherently used when choosing specific strategy tools. Based on the assumption that the strategy tools that are available for use by the strategy consulting team to complete their consulting engagement tasks yield the same strategic purpose but not necessarily the same strategic outcomes, the researcher probed the selection process of strategy tools during a strategic engagement, a process that seemed to be taken for granted by most consultants. The criteria for choosing specific strategy tools during a consulting engagement are presented below in Table 7.3 and constitutes *familiarity with strategy tool*, *purpose of strategic fit* and *imposed decision*.

Table 7.3: Category 4: Criteria for choosing strategy tools

Focused Code	Open Codes	Examples of Quotes
Familiarity with strategy tool	Formal Education	“couple of times at Varsity”, “chosen because of my formal training”, “I went into business school”, “in my final year of study”, “we use all of them”, “been exposed to quite a few different”, “I have done a few modules in my undergraduate on strategy”
	Previous use	“based on we’ve used it before”, “it is based on experience”, “based on past experience”, “tool’s effect in the previous projects”, “follow a similar kind of trend”
	Credibility	“there’s really good things said about it”, “have been proven and tested”, “why we... will trust it”, “proven success record”, “utilised the traditional strategy tools”
Purpose of strategic fit	Practicality	“this is what we tried, and it worked much better”, “what actually has worked before”
	Simplicity	“less can often be more”, “would not do that because it is too complex”, “very simple and it is a great tool”, “it’s logical ... very simple”,
	Appropriateness/Specificity	“for particular problems we use particular tools”, “might not be applicable for that particular client”, “you have used the same tool to do the same or similar type of analogy”
	Standardisation	“standardisation is key”, “remain within the form outline is to ensure standardisation”, “easier for everyone to understand”
	Customisation	“needed to build a tool”, “you can tailor fit to solve”, “excerpts of strategy tools”, “evolved the way of thinking”, “it is still hinging on it, but it is different”
Imposed decision	Senior management	“there won’t be much of a debate”, “senior... actually chooses the methodology”
	Predetermined use	“we’ve had to use the tool”, “we primarily outline them when we developed the response”
	Institutionalised practice	“it has become institutionalised knowledge”, “the tool of choice”

Source: Own data from the study.

Consultants described the first criteria for choosing specific strategy tools as being related to the consultant’s familiarity with the strategy tool when presented amongst other alternatives, which includes *formal education*, *previous use* and *credibility*. The familiarity with a strategy tool can be ascribed to a consultant’s previous exposure to strategy tools, previous use of a specific strategy tool and lastly the perceived credibility of the strategy tool for the consultant. Most consultants seems to have been exposed to several strategy tools, specifically during their educational and career-related development stages such as their

tertiary education (“couple of times at Varsity”, “I went into business school”, “in my final year of study” and “I have done a few modules in my undergraduate on strategy”) or within the formal training provided by the consulting firm in which the consultant is or was employed previously (“chosen because of my formal training”). Consultants also described their previous use of strategy tools to yield an affinity to and familiarity with the use and understanding of specific strategy tools. Here, consultants mentioned that selection criteria based on previous tool use may purely relate to familiarity with a strategy tool in relation to available alternatives (“based on we have used it before”), a consultant’s notion to select strategy tools that could potentially yield the same or secure outcomes (“tool’s effect in the previous projects”) or the selection of strategy tools that conform to a general trend or dispersed management or consulting fad (“follow a similar kind of trend”). Lastly, consultants described their predisposition to select strategy tools that they perceive as more credible than others (“there’s really good things said about it”, “proven success record” and ““why we... will trust it”).

The second criteria for selecting specific strategy tools in relation to alternatives, relate to the broader *purpose of strategic fit* of the strategy tool to the nature of the consulting engagement. Consultants related the purpose of strategic fit of a specific strategy tool to five underlying criteria thereof: the *practicality* of the tool in the context of the consulting engagement (“this is what we tried and it worked much better” and “what actually has worked before”), the *simplicity* of the strategy tool to enhance usability and shared understanding thereof (“very simple and it is a great tool” and “less can often be more”), the *appropriateness* or *specificity* of the strategy tool in ensuring the strategy tool yields the desired strategic outcomes relating to the nature of the strategic issue (“for particular problems we use particular tools” and “might not be applicable for that particular client”), the ability to *standardise* the strategy work conducted to ensure strategic fit, replicability over several instances of consulting engagements and for continuity into the strategy implementation phase (“standardisation is key”, “remain within the form outline is to ensure standardisation” and “easier for everyone to understand”) and the ability to customise the infrastructure of the strategy tool to ensure fit for strategic context (“you can tailor fit to solve” and “it is still hinging on it, but it is different”).

The last criteria for selecting specific strategy tools does not relate to the more seemingly rational decision-making processes of consultants and consulting teams in selecting strategy tools, but refer to the imposition of strategy tools from the three sources of *senior management*, *predetermined use* and *institutionalised practices*. Strategy tools may often not be selected by the consultant or consulting team itself, but by a higher authority such as the senior or executive management (“senior... actually chooses the methodology”). Relating to the more passive advisory and guiding role of senior and executive consultants, the decision to use a specific strategy tool might be imposed on the consulting team with, or without the team or consultant’s consent or agreement. The use of a specific strategy tool may also be predetermined, specifically in the event where strategy consulting engagements are the result of a bidding or tender process (“the other way is through your normal tender”), which requires comprehensive submissions in order to acquire the strategy consulting work or contract. These consulting proposals usually provide an outline of the prescribed methodology that is to be employed in the event the consulting firm is successful in being awarded the consulting work (“we primarily outline them when we developed the response”). The use of a specific strategy tool may also be imposed by the consulting team’s current or prospective client (“we’ve had to use the tool” or “objectives would be the client’s”). Lastly, the selection of a strategy tool may be due the institutionalisation of a specific strategy tool (“the tool of choice” and “it has become institutionalised knowledge”) within a strategy consulting firm, particularly where the selected strategy tool has become a proprietary source of competitive advantage for a strategy consulting firm (“it had a proven success record with our firm for many years”).

7.5 CATEGORY 4: ORGANISING INFRASTRUCTURE

In exploring the relationship between strategy consultants and their use of strategy tools during a strategy consulting engagement, the concept of *organising infrastructure* emerged strongly during simultaneous data collection and analysis. The emergence of this core category was signalled by consultants’ continuous use of the words *structure*, *framework*, *organise*, *allocate*, *process* and *enable* during the interviewing process, which prompted in-depth discussion of this category and to determine its appropriate dimensions or properties. The implicit ability of strategy tools to provide an organising infrastructure was found to relate to four core areas or dimensions that explain how consultants use strategy tools in order to

assist with organising within their consulting engagements. These four areas or dimensions with their associated codes and illustrative corresponding empirical data are listed in Table 7.4 below.

Table 7.4: Category 3: Dimensions of organising infrastructure

Focused Code	Open Codes	Examples of Quotes
Social Behavioural Organisation /	Allocating work	“the team is broken up to focus on various streams.”, “the other members...were on the ... work stream”, “worked on a particular section”, “in that way splitting the workloads”
	Structuring team Resource allocation	“normally have a manager... support from analysts, consultants and”, “creates proposal and allocates the resources based on that”, “this is what we need and this is what we have at our disposal”, “the resources get allocated prior”
	Conversational tool	“is a useful conversation tool”, “good foundation to start a robust and intellectual conversation”
	Creating through collaborating	“co-opted with interested employees”, “go there to help them”, “work alongside the client”, “done in conjunction with the client” “usefulness of this tool... fact that it is entirely customer centric”, “brainstorming the tool together”, “so we sat down and we brainstormed together”, “enable a co-creation environment”, and “when you actually brainstorm the SWOT analysis together
	Leading	“and later leading”, “lead over a period of.
	Journeying	“take the client on the journey”, “take someone along the journey”, “really powerful...to take the client along the journey”
	Guiding	“provide oversight and guidance”, “think about it without guidance”, “tools that will give a guiding framework”, “it is a guide as to”, “guide the report”
Prioritising strategic knowledge	Guided thinking	“frameworks is just to guide your thinking through a process”, “it allows you to focus your thought process”, “help you to differently think about something”, “structures your thinking”, “framework used just to guide thinking”, “facilitate thinking”, “intellectual conversation”, “guiding intellectual content development”
	Focusing (scope)	“you don’t want to be out there just doing everything... very well defined tool”, “you can almost narrow it down”, “areas to consider”, “thing we were focusing on”, “particularly relating to”
	Point of reference	“it just gives you a point of reference”, “nice just to have a reference point”
	Conceptualising	“way how you actually conceptualise the strategy”, “create a conceptual landscape”, “it makes it easier for them to conceptualise”
	Insight	“so we can look at it from an outside-in perspective”, “from which you’d be able to draw insights”, “to show our client...our thinking”

Focused Code	Open Codes	Examples of Quotes
	Understanding	“expert has gone through that process”, “this will be understanding”, “move on to understand”, “why it is put in this way and understand how”, “understanding of those components”, “tool provides the recommendation”
	Shared understanding	“tool developed... explaining to the client”, “to make everyone understand concepts”, “everyone uses it based on their understanding”, “create a framework...logical...that everybody can understand”
	Self-reflection	“tool...in essence...opportunity to self-reflect”, “always have to think about, why this”, “about being aware there is... learning”, “how does it help you to differently think”
Compositional Arrangements	Composition	“frameworks help me structure my input”, “structures your thinking”, “it gives your strategy some structure”, “the whole point of using...just need a structured framework”, “easier...when you use a structured framework”, “so that they do not feel too lost”
	(Logical) Framework	“whole concept behind it is to have a very sordid framework”, “using a specific methodology...got a structure from the framework”, “makes it very easy to create a framework”, “gives you a framework in which you can plug in information”, “use tools that will give a guiding framework”, “one is able to easily identify frameworks”, “not everyone has an easy framework to think through”, “in proposal you ... articulate your framework”, “find the framework that we mostly use”, “I tend to use planning frameworks”, “the frameworks that I use in my mind are logical”, “accurate, evidence-based logical with an understanding”
	Baseline	“it sets a good foundation”
	Content	“carefully thought out components”, “worked on a particular section”, “it was the content for me, not the process”, “if the content is wrong, you don’t have that guiding output”, “covered the key boxes”
	Clear components	“each of the component source”, “these are clearly defined definitions”. “understanding of those components”, “very good understanding of the components”, “debate amongst team of various components”, “tools may seem compartmentalising”, “it will give you a list of things”, “when it comes to a particular section”, “tool is there...sections in terms of what you need to do is also explained”
Processual Arrangements	Process	“from which you can follow a logical process”, “some kind of methodology of flow”, “it is a process of consolidation and research”, “the process itself is actually understanding the process”
	Determining steps	“these are the steps that we need to follow”, “we take the tools that we have... set step-by-step guide of how”, “which is followed step-by-step”, “when you go through it, it is a very structured process”
	Direction	“moving in the right direction”, “conversation going in a totally different direction”, “a point of direction”
	Pathfinding	“create a strategic pathway”, “tool-based approach, particularly pathfinding”,

Focused Code	Open Codes	Examples of Quotes
	Storytelling	“demonstrating...story-telling”, “methodology...being able to tell that story in the structure”

Source: Own data from the study.

7.5.1 Social/Behavioural Organisation

The first dimension of organising infrastructure relates to the social and behavioural dimension or aspect within the context of how strategy tools enable consultants to structure their consulting engagements. It portrays the ability of strategy tools to dictate or cause certain structured social activities between consultants themselves (intra-team) and between consultants and the organisational entity or client (client-team). The open codes that gave rise to the prominence of this dimension of organising infrastructure constitutes *allocating work, structuring team, resource allocation, conversational tool, creating through collaborating, leading, journeying and guiding*.

Consultants mentioned that strategy tools seem to have the implicit ability to structure or dictate how consulting teams typically distribute or allocate the work to be delivered during a consulting engagement. Strategy tools seemingly carry some sort of embedded intent or instruction, which causes specific work allocation, distribution or negotiation of workloads between members of the consulting team (“the team is broken up to focus on various streams” or “in that way splitting the workloads”). The concept of *streams* as in-vivo code relates to how strategy tools demarcate or delineate the boundaries of strategic information by implying or establishing specific streams of strategic knowledge to be considered (“worked on a particular section”). These streams carry with them embedded actions and intentions that are only made explicit once the consulting team starts to organise itself through the interpretation of the tool and the type of strategic knowledge consultants are to consider. In the consideration of the work to be performed once the strategy tool is enacted, is the notion of strategy tools to dictate the type of human resources that are to be allocated to enact the strategy tool. Strategy consultants are typically structured in hierarchical teams that imitates organisational hierarchy (see paragraph 7.3.3) with its associated norms and rules (“normally have a manager... support from analysts, consultants”). This allocation, distribution and negotiation of work streams can be assumed to differ between the different

organisational levels of consulting team members as team size is typically predetermined (“senior members create the proposal and allocate the resources based on that”) according to the scope of work as introduced in paragraph 7.3.1.

The next property of social organisation relates to the use of strategy tools to facilitate intra-team and client-team interactions by serving as a conversational tool which give structure to intellectual conversation. This property conceptualises strategy tools as useful mechanisms that enable, guide and structure conversations between members of the consulting team and with other organisational individuals (“is a useful conversation tool” and “good foundation to start a robust and intellectual conversation”). Consultants seemingly value this ability of strategy tools to structure and guide this intellectual foundation of conversing with other consultants and organisational clients (“usefulness of this tool ... fact that it is entirely customer centric¹⁹”) as the orientation of strategy tools as customer-centric conversational tools have various purpose and application during a consulting engagement. Not only do strategy tools seem to structure, signal and stimulate interaction between practitioners, but they are also used as dialectical tool with shared meaning to assist the organisational client in understanding contextual analysis of the organisational entity where and when it becomes the subject of strategic analysis (“we’ve had to use the tool with the client as opposed to just presenting what we have done”). Strategy tools therefore have the ability to signal and enforce certain social activities and interaction between consultants themselves as well as their clients. This interaction may encompass various practices and activities, such as client collaboration (“work alongside the client” and “done in conjunction with the client”), brainstorming (“brainstorming the tool together” and “so we sat down and we brainstormed together”) and other institutionalised practices of interaction with the intent of creating strategic knowledge through collaborating²⁰ according to the embedded actions and intent of the strategy tool (“enable a co-creation environment”).

The last three properties refer to the relational role of the consultant in its capacity as a perceived influential organisational advisor. Participants expressed the ability of strategy tools to facilitate social interaction between consultants and the client in a manner that constitutes an intense involvement of and interaction with the client in the doing of strategy

¹⁹ The word *centric* means focused around.

²⁰ Creating through collaboration in practice is referred to as co-creation.

consulting work. Consultants described themselves as taking on various advisory roles guided by the actions and intent of strategy tools, firstly through intensive relational involvement (“take the client on the journey”, “take someone along the journey” and “really powerful...to take the client along the journey”), which encapsulates the ability of strategy tools to create a shared understanding and meaning of the strategy work. Strategy tools also enable consultants to exert a leading and guiding role over the client in the process of pursuing strategic outcomes during the consulting engagement, as it allows consultants the rigidity and ability as mechanism to “provide oversight and guidance” and therefore legitimise the making of their strategy through using their strategy tools “that will give a guiding framework”.

7.5.2 Prioritising strategic knowledge

The next dimension of strategy tools embedded organising infrastructure relates to the manner in which consultants perceived strategy tools to signal an implied manner of guided thinking, which consultants adopt throughout the consulting engagement and enact through various activities and interactions. The emergent themes or most prominent open codes that gave rise to the prominence of this dimension of organising infrastructure can broadly be themed into three areas (which can also be conceptualised as a process): the notion of delineated thinking (*guided thinking, scope and focus and point of reference*), conceptualising and understanding (*conceptualising, insight, understanding and shared understanding*) and reflection (*self-reflection*).

The property that refers to the delineated thinking through prioritising and selecting appropriate strategic information can somehow be understood as a result of explicitly enacting the meaning and knowledge of the strategy tool. Consultants perceive strategy tools to allow them to deliberately and constantly evaluate the relevance and appropriateness of the strategic information that is considered throughout the consulting engagement (“guide your thinking through a process”, “allows you to focus your thought process” and “structures your thinking). In conceptualising strategy tools to allow for a specific *scope* or *focus* of strategic information, consultants constantly evaluate strategic information according to the *fit* for the tool and the contextual relevance of the strategic information (“you don’t want to be out there just doing everything”, “it just gives you a point

of reference” and “very well defined tool...”). Consultants then use this delineated thinking to prioritise specific strategic information by hand of the intent of the strategy tool and their contextualised understanding (“you can almost narrow it down”, “areas to consider”, “thing we were focusing on” and “particularly relating to”).

The next area is concerned with a more conceptual and abstract process of the sensemaking of strategic information that have been evaluated and prioritised for decision-making. This property refers to a more cognitive process of experiential exploring and traversing, which may give rise to certain social activities and interactions. Consultants mentioned that strategy tools enable them to conduct their consulting work in a way that aids in creating a conceptualised understanding of the strategy tool’s intent and meaning (“way how you actually conceptualise the strategy”, “create a conceptual landscape” and “it makes it easier for them to conceptualise”). Through their understanding and sensemaking of the strategic information that are presented by the strategy tool (“this will be understanding”, “move on to understand”, “why it is put in this way and understand how” and “understanding of those components”) they are able to create a shared understanding with the client and other involved stakeholders (“to make everyone understand concepts”, “explaining to the client” and “create a framework...that everybody can understand”). This area of sensemaking is enhanced through the concept of *insight*, which relates to the ability of strategy tools to provide an enriched perspective through enforcing structured or guided thinking, delineation of strategic information and conceptualising the strategic issue at hand (“from which you’d be able to draw insights”, “to show our client our thinking” and “so we can look at it from an outside-in perspective”).

The last area that implies the ability of strategy tools to signal activities that create focus, meaning and understanding is the use of strategy tools as a tool of critical self-reflection (“tool...in essence...opportunity to self-reflect”). Consultants described how they utilise the strategy tool almost in the sense of a forced learning process (“about being aware there is... learning”), whereby the consultant rationalises strategic decisions by relating acquired strategic information to the implied intent of the strategy tool (“tool provides the recommendation”). This process of self-reflection seems to be embodied through consultant’s description of his/her ability to engage in critical thinking (“how does it help you to differently think” and “critical thinking is probably the most important component”).

The three notions of delineation of strategic information, conceptualisation and shared understanding of available strategic information as well as the critical reflection to prioritise strategic information is conceptualised and consequently labelled as prioritising strategic knowledge.

7.5.3 Compositional arrangements

The next dimension of organising infrastructure pertains to the ability of strategy tools to provide certain structural or compositional arrangements, in providing specific plans or activities to structure progress within a complex situation (“the ability to simplify the complex and to create a manageable path for others to follow”). This dimension is derived from the interpretation of prominent open codes such as *composition*, *logical framework*, *baseline*, *content* and *clear components*.

The emergence of this dimension is almost anticipated within the context of strategy consulting, as strategy consulting implies working within an ambiguous and complex environment (“because of the complexity of the project” and “challenging to engage in an environment such as ours”). Consultants described this embedded ability of strategy tools to provide compositional arrangements by referring to strategy tools as frameworks that provide prescription for structuring strategic input (“frameworks help me structure my input”). Consultants also perceived these compositional arrangements as adding value to the consulting engagement through the way that it “gives your strategy some structure”. Many consultants believed that the rationale for using strategy tools related to the necessity of employing structured frameworks (“the whole point of using tools... need a structured framework”), which perhaps suggests (or confirm) that the use of strategy tools is an institutional expectation for professional consultants. Considering that most consultants used words such as “guidance”, “thinking”, “logical”, “sordid”, “accurate” and “evidence-based” to describe the characteristics of these frameworks they employ in practice, strategy tools might be perceived to enhance credibility and legitimacy of strategy consulting work and subsequently, the organisational strategy that is developed for the client. Strategy tools also establish strong theoretical bases (“the theoretical side of learning it” and “frameworks in theory are quite evolved”) through these compositional arrangements, believed by

participants to provide an adequate basis for the construction of a strategy (“it sets a good foundation”).

Consultants comprehensively described an inclination to have an orientation towards this compositional dimension of strategy tools, where the adoption and use of a strategy tool is more concerned with issues of comprehensiveness and applicability rather than processual strategy development (“it was the content for me, not the process” and “if the content is wrong, you don’t have that guiding output”). Through describing the compositional arrangements of strategy tools as “sections” (“when it comes to a particular section”), consultants value the role of compositional arrangements in providing a sense of security and theoretical credibility (“carefully thought out components” and “these are clearly defined definitions) through the content it prescribes, which aids in creating appropriate and complete strategies (“covered the key boxes” and “it will give you a list of things”). The nature of the compositional arrangements or sections may also signal certain social activities among members of the consulting team such as discussion or debate (“debate amongst team of various components” and “we discussed each of the components of the strategic plan”).

7.5.4 Processual arrangements

The last dimension of organising infrastructure reflects the processual arrangements that are embedded in strategy tools. Five themes or dimensions emerged from the interview data to constitute this dimension of processual arrangement, namely *process*, *determining steps*, *direction*, *pathfinding* and *storytelling*.

Perhaps the most prominent property of the dimension of processual arrangements relates to the embedded ability of strategy tools to establish a logical process of action and progression (“from which you can follow a logical process”, “some kind of methodology of flow” and “it is a process of consolidation and research”). Most consultants described these processual arrangements as logical actions or steps that guide them to achieve certain interim outcomes during the strategy consulting engagement (“these are the steps that we need to follow”, “we take the tools that we have... set step-by-step guide of how” and “which is followed step-by-step”), to ultimately create a process that conforms to the institutionalised

methodical rigidity that is expected of consultants (“when you go through it, it is a very structured process”). Adhering to the implicit processual arrangements of strategy tools create what is perceived as *direction*, which can be perhaps better described by the achievement of shared understanding between consultant and organisational entity or client (“moving in the right direction” or in the case of an absence of processual arrangements - “conversation going in a totally different direction”). These processual arrangements can also be described as a process of *pathfinding* whereby the actions and activities signalled by the use of the strategy tool “creates a strategic pathway” that becomes a metaphor for the establishing intent and shaping direction for an organisational strategy that is being developed. Lastly, consultants also used the metaphor of *storytelling* (“demonstrating ... story-telling”) to illustrate the notion of these processual arrangements to embody a specific or schematic theme of strategic action or strategic direction through following the implicit organising infrastructure of the adopted strategy tool or methodology (“methodology...being able to tell that story in the structure”).

7.6 CATEGORY 5: INFORMATION FINDING

As an activity during the process of strategy consulting, the prominent phenomenon of information finding emerged strongly during the simultaneous data collection and analysis of interview data. Information finding as an activity seems to be a repetitive, omnipresent activity that is an essential characteristic and process of and within strategy consulting work (“you need to be able to get information, assess it, and make some sort of reasonable, logical prediction in support of your client”). Through in-depth discussions with consultants that centred around the activity of information finding in the broader context of using strategy tools, several dimensions and sub-dimensions or properties of information finding emerged (see Table 7.5 below). These ranged from the *practices for finding information* to the various *sources of information* to the underlying *dimensions of information finding processes* that consultants may utilise.

Table 7.5: Category 6: Information finding

Focused Code	Open Codes	Examples of Quotes
	Researching	“big research component that comes into play”, “research is one”, “spent about a week just doing research”, “a lot of research”, “of course starts with

Focused Code	Open Codes	Examples of Quotes
Activities for finding information		some research”, “it takes on a more research”, “both desktop research and primary research”, “junior members who might be tasked with the research phase”, “we use a lot of desktop-based research to find the information that we need”, “scraping through the reports”, “we then examined the weaknesses”, “and then again triangulating it”
	Interviewing	“in the individual one-on-one session we can get in-depth views”, “on who conducts the interview”, so it is interviews, and”, “you are doing interviews”, “interviews are often a great way of soliciting information”
	Conversing	“talk to your more senior people”, “get the conversation going”, “and the conversation that is taking place”, “interviews, or other talks”
	Brainstorming	“we brainstormed together”, “and brainstorming on possible ways”, “co-created in the brainstorming session”, “when you actually brainstorm”
Sources of information	World Wide Web	“desktop-based research to find the information”, “your desktop research”
	Organisational data	“they have access to reports, data, customer information”, “within the corporate itself”,
	Competitors	“took some learnings from it”, “how they would approach it”, “copy some learnings”
	Institutionary knowledge	“has almost become institutional knowledge”, “we have learning platforms”
	Clients	“client ... provide sort of a point of view”, “have interviews with middle management”, “many interviews with clients”, “having the opportunity to sit down with the client”
	Databases	“go in there and download”, “painful because there is no such database”, “and has Microsoft”, “control the platform... help you locate”
	Previous Projects	“I did do is to go to previous projects”, “how did they”, “central repository where you can access”
	Subject Matter Experts	“the lady knew exactly everything”, “they have a lot more in-depth knowledge”
Dimensions of information finding process	Intensive	“gauge exactly ...copious amounts of notes”,
	Constrained	“so you are often constrained”
	Systematic process	“it will give you a list of things”, “then what you need to do next”, “and now this”, “it is a process of consolidation and research”, “the next step is”
	Variety	“depending on who you need to engage with”, “so there is a lot of activity”, “everyone has a different approach”
	Discretionary	“fit in to where we wanted it to go”, “manager’s discretion about how”, “of what we believed should go into these”

Source: Own data from the study.

7.6.1 Activities for finding information

The most prominent dimension of information finding relates to the activities that consultants employ in order to elicit or gather strategic information from various sources or repositories of knowledge. Four prominent activities emerged during constant comparison of instances of information finding in different engagements and contexts, namely that of *researching*, *interviewing*, *conversing* and *brainstorming*.

The first activity of *researching* (“big research component that comes into play”, “research is one”, “spent about a week just doing research” and “a lot of research”) refers to the systematic process through which consultants elicit strategic information from various sources to establish a comprehensive, contextual understanding of the strategic issue at hand. The activity of researching is employed through two main mechanisms: research conducted in an online or digital environment (referred to as desktop research) or primary offline research involving human and non-human subjects. The activity of researching is mostly conducted by the more junior consultants such as strategy analysts or junior consultants (“junior members who might be tasked with the research phase”) and usually occurs primarily during the earlier phases of the strategy consulting engagement (“of course starts with some research”). However, research may be conducted in various phases of the strategy engagement as new strategic issues arise through later analysis and processes of prioritising strategic information (“I mean it is a process of consolidation and research”).

The second activity of *interviewing* refers to the more structured verbal dialogue or dialectical discussion a consultant may have with any other organisational actor. Interviewing is perceived as a superior practice for information finding (“interviews are often a great way of soliciting information”) and is generally structured and conducted on an individual basis by the consultant (“in the individual one-on-one session we can get in-depth views”). Interviewing may be conducted through various formats (“in determining how to conduct this interview”) that are usually specific to purpose (“specific exactly the type of research ... you are focusing on”). Consultants engage in the activity of interviewing not only to solicit strategic information, but also to enhance their professional and social relation with their clients as interviewing often requires intensive interpersonal activities and personal engagement (“giving them a chance to give an input”, “the client is aware as to what you

are doing” and “engaging the client in a different setting”). The activity of interviewing seems to be influenced by the prominent role hierarchy in the consulting firm, as participants described the more senior consultants to conduct and lead these interviews (“contribute to interviews and later leading interviews”), as opposed to more junior consultants.

A similar practice to interviewing, the more informal practice of *conversing* relates to the informal and unstructured manner of dialectical discussion between consultant and organisational actor to elicit strategic information (“engage freely and openly”). With the main purpose of soliciting strategic information, the activity of conversing seems to be longer in duration than structured interviewing, and also encompasses broader strategic discourse (“the conversation that is taking place”). Though being more informal and of longer temporality, conversing remains a key source of strategic information (“captures the ongoing conversation”).

The notion of *brainstorming* as a popular activity in generating strategic information is usually enacted with the participation of multiple organisational actors from the strategy consulting firm and the client (“we brainstormed together” and “co-created in the brainstorming session”). Brainstorming may be utilised to render processes of the strategy consulting engagement explicit (“brainstorming on possible ways”) or may delineate the specific nature of the focused strategic information that is imperative to be produced in order to enable the appropriate strategic outcomes (“brainstorm the SWOT analysis together”).

Participants lastly identified the practice of *workshopping* (not included above), which consultants often employ to generate or solicit strategic information. However, the activity of workshopping was excluded from the analysis as the strategy literature reviewed after analysis argued for workshopping as strategic *praxis* rather than strategic activity.

7.6.2 Sources of information

In addition to identifying the activities that consultants may use to find strategic information, consultants also identified some of the typical sources that they use to solicit or find relevant strategic information. These may include:

- The World Wide Web (“desktop-based research to find the information” and “your desktop research”). One of the major sources that consultants use in order to find strategic information, is through the use of the World Wide Web. Strategic information here can be accessed through various online platforms that contain electronic articles, reports, books, journals, databases, presentations and other statistics.
- Organisational data (“they have access to reports, data, customer information” and “within the corporate itself”) refers to the offline data that forms part of the client’s institutional repositories and knowledge and the use thereof mostly requires access to and permission of gatekeepers of organisational data.
- Competitors (“took some learnings from it”, “how they would approach it” and “copy some learnings”) may also be an important source of knowledge for consultants. By accessing publications, reports and articles published by other consulting firms, consultants often gather strategic information that could relate to environmental contexts or the use of popular or acclaimed methodologies and approaches in problem solving.
- Institutionary knowledge (“has almost become institutional knowledge” and “we have learning platforms”) provide another source of strategic information that consultants regularly access during their consulting engagement.
- Access to clients (“client ... provide sort of a point of view”, “have interviews with middle management”, “many interviews with clients” and “having the opportunity to sit down with the client”) remain an important source of strategic information for consultants. A rather large part of interviews centred around interaction with the client and the client’s organisational entity, which also incorporated access to executive and senior management as sources of strategic information, as well as other key individuals within the organisation.
- Databases (“go in there and download”, “control the platform... help you locate” and “painful because there is no such database”) contain categorised, centralised strategic information that usually contain data or statistics of specific subject matters, such as finance or mining.
- Previous projects (“is to go to previous projects”, “how did they” and “central repository where you can access”) present another source of strategic information through which consultants analyse, select and appropriate specific strategic information in their consulting engagement projects.

- Lastly, subject matter experts (“the lady knew exactly everything” and “they have a lot more in-depth knowledge”) represent strategic information that could be subject, process or problem specific, such as highly experienced medical practitioners, education specialists, knowledgeable law practitioners or accredited financial professionals such as chartered accountants.

7.6.3 Dimensions of information finding

Not only were participants able to identify several activities underlying information finding processes and the typical sources that constitute the resources for finding strategic information, but they were also able to identify certain characteristics of the information finding process during a strategy consulting engagement. Firstly, the process of information finding is characterised by a heightened *intensity* of practice (“gauge exactly ... take copious amounts of notes”), mostly due to the general time (“get more work done in a shorter amount of time”) and practical *constraints* which is inherent of the strategy consulting environment (“so you are often constrained”). Information finding does not happen in a random fashion, but the process is described as *systematic* (“it will give you a list of things” and “then what you need to do next”), and strongly correlates to the notion of the processual arrangements that are implicit to the use of strategy tools (see paragraph 7.5.4). The information finding process is also deemed as varied activity of *discretionary nature*. As the more junior consultants are typically engaged in the process of information finding, the evaluation and prioritisation of strategic information may be heavily influenced by agency, bias or personal discretion (“fit in to where we wanted it to go”, “manager’s discretion about how” and “of what we believed should go into these”) that is determined by the consultant’s beliefs and perspectives, which may take shape through different mechanisms and approaches (“so there is a lot of activity” and “everyone has a different approach”).

CHAPTER 8: DISCUSSION

The previous chapter systematically introduced the five core grounded theory categories as it emerged from the data through appropriate grounded theory strategies. This chapter provides a theoretical discussion of the emerged categories and their associated dimensions and/or properties at hand of the relevant theoretical framework which underlies the strategy as practice paradigm. As the research objective of this study is to generate and/or build on theory that will contribute to understanding and explaining the interplay between strategy consultants and their use of strategy tools in their everyday strategy consulting work, the most prominent categories or concepts as discussed in Chapter 7 will be analysed by incorporating these categories that are grounded into empirical data into the existing theoretical framework, therefore contributing to building theory rather than to generate new theory or test existing theory. This chapter starts by providing an overview of the relationship between practice theory, practice and strategy as practice as it is situated within the broader theoretical framework that underlies the strategy as practice domain before continuing with theoretical integration of these categories into the existing strategy as practice literature.

8.1 PRACTICE THEORY, PRACTICE AND STRATEGY AS PRACTICE

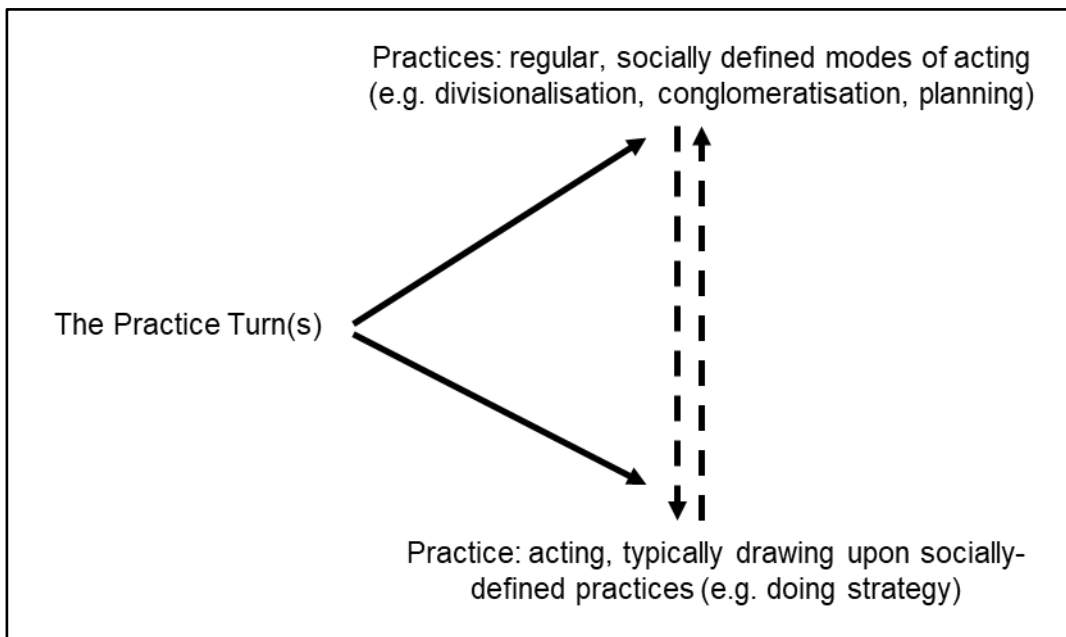
In order to structure, analyse and understand the emerged categories as described in Chapter 7, it is important to revisit the definition of practice and how practice, practice theory and practice-based theories become prominent frameworks for analysis of the grounded data for this study.

Schatzki (2001:10) conceptualises practice as the “primary generic social thing” that constitutes every social life. As part of the broader *practice turn* within the social sciences (Whittington, 2006) and the general movement towards the integration of macro-micro perspectives in American sociology traditions as well as the integration of agency-structure perspectives in European sociology traditions (Ritzer & Stepnisky, 2014:488), is *practice theory* (also see paragraph 4.2) which has become an essential perspective with increased theoretical attention and importance (Schatzki, 1996; Schatzki, Knorr-Cetina & von Savigny, 2001 in Ritzer & Stepnisky, 2014:527). As a common element of several social theories from

influencing and seminal sociologists such as Giddens (1987), Bourdieu (1990), Garfinkel (1967), Foucault (1977) and Latour (1991), the element of practice has become a common concept in an attempt to bridge the traditional macro-micro and agency-structure dichotomies in the broader social sciences. According to Biernacki (2007:3607), the concept of practice “emphasises the impact of taken-for-granted, pre-theoretical assumptions of human conduct”. Practice may perhaps then be best described as the commonly found, routinised way of how individuals act and it therefore incorporates routines and pre-theoretical assumptions that influence the way in which individuals would act within their social setting, specifically with reference to how the individual manages its body, treats or manipulates certain material objects, handles subjects, describes material and non-material things and also how the individual makes sense and understands the social world in which it functions (Ritzer & Stepnisky, 2014:528).

It is important, however, to emphasise how the broader practice theory relates to the strategy as practice paradigm and how strategy as practice differs from the notion of the social practice itself. Kaiser and Kampe (2005) describe how strategy as practice can be distinguished from a single practice: as strategy as practice foregrounds the role of the strategist and therefore centres its interest around the behaviour, actions and interactions of the individual as a strategist, it focuses on the particular practices that the strategist will draw upon within a specific context in order to enact his or her strategy work, or simply put – to strategise (Jarzabkowski, 2003:24). These practices may include the use of *strategic practices* – these refer to the socially defined things such as methods, routines, artefacts or habits that inform specific strategic action, such as the method of a strategic analysis. Strategy as practice refers specifically to those situations, behaviours or interactions that take place between strategists and subsequently have strategic activity as a result of these behaviours and interactions. Strategy as practice can from this perspective therefore also be briefly defined as the “application and interpretation of strategic practices” (Kaiser & Kampe, 2005:8), as illustrated in Figure 8.1 below.

Figure 8.1: Strategy as practice: the interplay of practices and practice



Source: Whittington (2001:6)

Although a somewhat complex ambiguity, the difference between the practices and the practice is as a result of the interconnectedness of practice between the macro and micro, or between actions and broader structures (as illustrated above in Figure 8.1). The strategic practices present are conceptualised as the structuring elements of the strategising practice during the process of strategising, which in itself again creates strategic practices by the activity that is performed. The focus in strategy as practice is therefore on how these situations of strategising influence the strategic orientation of the organisational entity and how the activity of individuals enlivens the organisational entity (Cummings & Wilson, 2003; Whittington, 2001, 2002 in Kaiser & Kampe, 2005:9).

8.2 SUMMARY OF QUALITATIVE FINDINGS

The empirical findings – embodied through five prominent and relevant grounded theory categories and their associated dimensions or properties as robustly described in Chapter seven are summarised below in Table 8.1. With reference to paragraph 7.2, the table illustrates the grounded theory coding approach (see paragraph 5.4.5), where the most abstract codes represent the category whilst the level of focused codes represent the dimensions or properties of the specific category, developed through the process of constant

comparison. It should be noted that the open codes discussed in Chapter 7 are not exhaustive content, but were only introduced to explain the reasoning process towards the focused codes or dimensions and properties of the categories, and are therefore not included in the theoretical discussion, which centres around the category itself.

The five grounded theory categories can be broadly grouped into two main areas of theoretical importance. The first two categories of *definition of strategy consulting* and the *strategy consultant in professional practice* relates pertinently to the part of the research agenda in strategy as practice which is centred around the identity of the strategist according to the practice perspective. Strategy consultants as external strategy practitioners of corporate strategy are theoretically classified under the definition of strategist within the practice perspective, therefore, these two categories contribute to the description of the South African strategy consultant in practice. The remaining three categories of *selecting strategy tools*, *organising infrastructure* and *information finding* all have identifiable elements that relate these to broader practice and practice-based theories in building the strategy as practice research agenda.

Table 8.1: Summary: Qualitative Findings

#	Category	Dimensions / Properties
1	Definition of strategy consulting	A function
		An industry
		A subject
		An engagement
2	The professional identity of the consultant in practice	Metaphorical Proximity
		Superior professional status
		Role hierarchy
		Distinguishable skills
3	Selecting strategy tools	Familiarity with strategy tool
		Purpose of strategic fit
		Imposed decision
4	Organising infrastructure	Social / Behavioural organisation
		Prioritising strategic knowledge
		Compositional Arrangements
		Processual Arrangements
5	Information finding	Activities for finding information
		Sources of information
		Dimensions of information finding process

Source: Own data from the study.

8.3 CATEGORY 1: A DEFINITION OF CONSULTING

As described in paragraph 7.2, consultants continuously referred to the word *consulting*, *strategy consulting* or *management consulting* in order to describe both their profession and daily work of strategy consulting for an organisational entity as client. Though the term consulting has diffused throughout various industries to mainly describe services of an advisory nature, the word *consulting* within this context is commonly referred to as the practice of management consulting, of which strategy consulting forms a subset of consulting services. As a category, the researcher was able to establish four dimensions of this definition by making use of constant comparison. These four emergent dimensions were strategy consulting as a *function*, an *industry*, a *subject* or the more social orientation of consulting as an *engagement*.

Before we continue to theoretically analyse and enhance the definition of strategy consulting at hand of the emergent dimensions of *strategy consulting*, it will be helpful to recall and reconsider four prominent and comprehensive definitions of management consulting used within the strategy literature. One of the earliest definitions of management consulting was by The Association of Consulting Management Engineers (ACME) which developed a definition of management consulting in the 1960s when the profession saw the emergence of professional legitimacy and the industry experienced magnificent growth, evident by the establishment of global consulting firms such as the Boston Consulting Group and McKinsey & Co (McKenna, 1995). The ACME described consulting as “the professional service performed by specially trained and experienced persons in helping managers identify and solve managerial and operating problems of the various institutions of our society. This professional service focuses on improving the managerial, operating, and economic performance of these institutions” (Higdon, 1969:306). Subsequently, Greiner and Metzger (1983:7) developed a definition of management consulting that is largely on par with the original definition of the ACME, describing management consulting as “an advisory service contracted for and provided to organisations by specially trained and qualified persons, who assist, in an objective and independent manner, the client organisation to identify management problems, analyse such problems, recommend solutions to these problems, and help, when requested, in the implementation of solutions”. More contemporary

definitions such as one by Kipping and Clark (2012:7) focus on two major elements of management consulting: firstly as an economic activity (therefore describing management consulting as a business) and the subsequent focus of human capital in management consulting (with people that portray themselves as “trusted professional advisors”), as some of the most prestigious consulting firms in the world tend to hire new business school graduates and other “high-quality” individuals. Another contemporary definition of management consulting places emphasis on the professional of the consulting practice rather than the industry, with David *et al.* (2013:35) stating that “management consultants advise corporations on their strategy and operations, with the goal of improving organisational performance”.

Analysing these four definitions of management consulting highlights a prominent, but unidirectional theoretical perspective of management consulting: that of a professional advisory service delivered by highly qualified, trained and skilled professionals. This definition is heavily oriented towards an emphasis on a supplier-client relational activity and economic exchange, whereby the professional of superior status is paid to deliver a service that will enhance strategic outcomes. The strategy as practice perspective and its various theoretical underpinnings, however, shapes this thinking around strategy consulting in various ways. If one argues that the “improved organisational performance” of the organisation is as result of the consultant’s direct or indirect influence within the organisation through delivering strategy consulting services, one immediately needs to ask “how” and “why” and “through what mechanisms”? Considering the element of *advisory* service, one can almost instantly deduce that organisational change cannot come from *advisory* actions alone, but the consultant would need to cause a fundamental change within the organisation to have improved organisational performance as effect. Therefore, one starts to ask the question whether the definition of management consulting is an appropriate theoretical definition to describe the practice of strategy consulting?

In adopting a practice perspective, it is assumed that the activities, behaviour and practices of the consultant give rise to strategic activity, thrusting the organisation into a strategic direction which is perceived or observed as organisational change. Considering the four emerging dimensions of strategy consulting – that of *a function, an industry, a subject* and *an engagement*, the conceptualisation of strategy consulting as an *engagement* becomes a

useful dimension in differentiating between the definitions of management consulting and strategy consulting. With the strategy as practice perspective and its focus on the individual strategist, alongside the actions and interactions of the individual that gives rise to strategic activity within the organisation, the definition of strategy consulting within strategy as practice therefore begs for wider theoretical dimensions or meanings of strategy consulting.

The strategy as practice perspective does not see strategy consulting as a pure economic exchange, but acknowledges that the actions, interactions and behaviour of a consultant might have strategic consequences for an organisation. In order to understand the operational side and nature of strategy consulting from a practice perspective, the study therefore acknowledges and incorporates the dimensions of strategy consulting as both a function and an engagement, but leaned more towards the definition of engagement and how it is related to the other emerging categories and their dimensions and/or properties. By adopting the theoretical perspectives of both Reckwitz (2002), Nicolini (2017) and Schatzki (2002) and their conceptualisations of practice, we conceptualise strategy consulting as the result-oriented outcome of interactions between the individual, its use of strategic practices as well as the context within which these strategic practices occur, and therefore rather define *strategy consulting as an artful praxis of strategic engagement that spans over a specific period of time*, rather than a strategic practice in itself.

8.4 CATEGORY 2: THE PROFESSIONAL IDENTITY OF THE CONSULTANT IN PRACTICE

The concept of a strategy consultant in professional practice is described in Chapter 6 by means of four properties that emerged from the empirical data, namely *metaphorical proximity*, *superior professional status*, *role hierarchy* and *desirable skills*. These four properties emerged from consultants' robust description of themselves as consultants in practice and how consultants typically perceive themselves as strategy professionals. Considering the earlier definitions of management consultants by scholars such as Greiner and Metzger (1983:7) that is more oriented towards the skills of the individual consultant, consultants have been characterised by what they *do* for, and what they *achieve* within the client organisation such as identifying management problems, or analysing these problems or implementing solutions for the client organisation. However, from a practice perspective,

we can abstract these four properties of *metaphorical proximity*, *superior professional status*, *role hierarchy* and *desirable skills* to the more abstract concepts of *distance*, *status*, *structure* and *skills* in order to find an appropriate theoretical fit for these properties within the overarching theoretical framework of practice theory and strategy as practice.

8.4.1 Metaphorical proximity

The first concept of *metaphorical proximity* is borrowed from the broader organisational theory concept of proximity and therefore relates to the perceived *distance* of the consultant in terms of the client organisation (Schilling, 2002:174:175). Constituting elements such as an abstract externality to the organisation, a temporal engagement and a defined scope of work, the notion of *metaphorical proximity* therefore brings several questions to mind, pertaining to the perceived status of the consultant and the way in which this identity is constructed by those outside of the strategy consulting profession – specifically the client organisation or the potential client organisation. More important, however, is the question of how this *distance* of the consultant affects the work of the consultant within the client organisation and the subsequent influence of this distance on the organisation’s strategy. In searching for a relevant theoretical understanding of the impact of this metaphorical proximity as a *distance*, the researcher discovered the use of the concept of *Simmelian stranger*, which is based on the concept of a *stranger* by the German sociologist and philosopher Georg Simmel (1950). Nordqvist and Melin (2008) and Nordqvist (2011) used this concept by integrating literature from the strategy as practice and family business strategy fields, in order to explain the influence of strategic planning champions in a family business. Based on Simmel’s theoretical underpinnings of what constitutes a stranger, Nordqvist and Melin (2008:327) describes the Simmelian stranger as a professional who “strikes a balance between distance and closeness in the interaction that gives other actors a sense of objectivity and a sense of confidence fostering exchange information. This combination of closeness and distance means that the specific distance of a stranger from other actors involved in strategic work allows them to interact in differing ways”. The Simmelian stranger is also referred to as a “known stranger” within their empirical study and is characterised as an experienced, independent strategist who did not seem to bear either individual or external special interests (Nordqvist & Melin, 2008:339). In subsequent work by Nordqvist (2011), Nordqvist deduced the concept of the Simmelian stranger as a credible

interpretation of why certain strategists were able to exert more influence on strategic activity within the family business, and was also able to observe that those Simmelian stranger strategists who became too familiar with the owner family and subsequently got more involved in the family firm, had a reduced degree of detachment in their strategy work (Nordqvist, 2011:31). Another interesting element of Nordqvist's findings, was that Simmelian strangers were able to move easier between formal and informal strategic practices, increasing their ability to generate new strategic ideas and enhance creativity and flexibility in the strategy process through creating "hybrid arenas" which offer adequate structure and predictability for other organisational actors to feel involved (2011:35-37). Schulze, Lubatkin and Dino (2003) also found in a similar vein that within the domain of family business strategy, intense family involvement may hamper the development of strategic ideas.

Another relevant theoretical explanation for the notion of metaphorical proximity can be found in the broader organisational theory, as it relates to both intra-organisational (e.g. Schilling, 2002) and inter-organisational interactions (Knoben & Oerlemans, 2006:71). Within this study's context of inter-organisational interaction between internal and external actors, Knoben and Oerlemans (2006:71) presents several additional understandings of the concept of proximity in addition to what is already understood by proximity in terms of geographical closeness, such as institutional proximity (e.g. Kirat & Lung, 1999), organisational proximity (e.g. Meisters & Werker, 2004), cultural proximity (e.g. Gill & Butler, 2003) social proximity (e.g. Bradshaw, 2001) and technological proximity (e.g. Greunz, 2003). Whilst the concept of institutional proximity relates more to cultural proximity and is a useful explanation for collective learning through the diffusion of common rules, norms and presentations (Capello 1999:356 in Knoben & Oerlemans, 2006:76), organisational proximity provides a more useful understanding in explaining interaction within the context of the strategy consulting engagement. Organisational proximity is believed to facilitate the combination of both strategic information and therefore strategic knowledge from the interaction parties, whereas these parties transfer implicit or tacit knowledge as well as other resources between the interacting parties (Burmeister & Colletis-Wahl, 1997 in Knoben & Oerlemans, 2006:75). It is therefore an important prerequisite for collective learning as well as the joint formation of strategic resources and enhancing innovation (Knoben & Oerlemans, 2006:75).

Borrowing from Nordqvist and Melin (2008) and Melin's (2011) studies in their integration of strategy as practice and family business strategy, and combining these in relation to the definition and existing theory regarding organisational proximity, several questions come to mind. Given the foregrounding of the individual in social context and analysis of the strategy practitioner as actor within the strategy as practice perspective, rather than a focus on the organisation or even the type of organisation (e.g. corporate organisation, non-profit organisation or family business) as unit of analysis, we can conceptually draw distinct similarities between the consultant and its client organisation, and the strategic planner and its client organisation (albeit family-owned) as illustrated below in Table 8.2.

Table 8.2: A comparison to the Simmelian Stranger

Concept in strategy as practice	Current study	Nordqvist & Melin (2008), Nordqvist (2011)
Strategy practitioner	Strategy consultant	Strategic planner
Strategic outcome	Formulating Strategy	Improve strategy processes
Strategic practice	Strategy Tool	Strategy Tool
Concept of distance	Metaphorical Proximity	Simmelian stranger
Classification of practices	Informal and Formal	Informal and Formal

Source: Own compilation.

Further, in relation to the concept of organisational proximity as explanation for joint learning, interaction and generating strategic knowledge as proposed by Knobens and Oerlemans (2006), we can develop two theoretical propositions with regard to metaphorical proximity and the consultant.

Proposition P¹: The perceived metaphorical proximity of the strategy consultant to the client organisation influences strategic outcomes.

Proposition P²: The perceived metaphorical proximity of the strategy consultant to the client organisation, influences the strategic knowledge that is produced.

8.4.2 Status and hierarchy

To explore and understand the second and third properties of *superior status* and *role*

hierarchy as constituting the professional identity of the strategy consultant in practice, one does not need to venture far from the strategy as practice paradigm and its theoretical underpinnings, especially the work of Bourdieu (1990), and we consequently adopt a Bourdieusian perspective on explaining status and hierarchy.

Consultants described themselves as professionals with a somewhat distinct identity, using concepts such as superiority, advisory role, professional networks, superior problem-solving abilities, methodical rigidity and knowledge to allude to the idea that consultants see themselves as professionals that enjoy a superior identity within the professional services field. Assuming that this perceived superior identity is in fact correct, it is important to understand how consultants see themselves and the consulting industry as a superior profession, and more importantly how this can be explained by adopting a practice perspective. Within the current theoretical paradigm of strategy as practice, we abstract this perceived superior identity to the concept of *status* in order to find theoretical explanations for this phenomenon and to build on current theory with regards to the identity of the consultant as strategist within strategy as practice. This discussion also illuminates theoretical argument for the subsequent property of role hierarchy.

A useful explanation of *status* is found in the theoretical work of Bourdieu. Bourdieu attempted to bridge the agency-structure dichotomy in European sociological theoretical advancements, and proposed the practice theory concepts of *habitus* and *field* (see paragraph 4.6) to overcome the dichotomy of objectivism and subjectivism (Ritzer & Stepnisky, 2014:516-527). The concept of *habitus* refers to the cognitive structures that individuals use in order to cope with the social world around them in a similar notion as what can be understood as “common sense” (Holton, 2000; Ritzer & Stepnisky, 2014:520). *Habitus* varies according to social positions occupied (Bourdieu, 1990) and can also be conceptualised as a “structuring structure” that organises social representation through an individual’s thought and choice.

The notion of practice becomes important in this discussion as it is practice that mediates between *habitus* and social reality as practice ultimately shapes the habits of the individual (Ritzer & Stepnisky, 2014:521). Bourdieu’s concept of *field* is used to describe the individual’s relational network as a separate entity from the individual’s own consciousness

(Bourdieu & Wacquant, 1992:97). Therefore, Bourdieu argues that the positions of individuals within this field are determined by the amount of capital they possess, whether *economic*, *cultural* or *social* capital. These positions of individuals within a field impose the principle of hierarchisation (Wacquant, 1989:40). Drawing upon this theoretical explanation of hierarchisation, we can therefore argue that from a practice perspective, the hierarchy of strategy consulting firms is an explicit embodiment of how capital is situated within the consulting firm, specifically taking into consideration the structure of the relational network or the possession of social capital as units of analyses. Considering the typical three-tiered hierarchical structure of the consulting firm, the relational network and its associated social capital enjoys a particularly strong presence in the upper tiers of this hierarchy (e.g. “Through their relationships”, “where prior the partner had a connection” and “who you have connections with”).

Data from the interviews did not allude to the same description in the middle and lowest tier of this hierarchy. The explanation for hierarchical differences in capital between the lower levels, however, might be situated in the possession of *cultural* capital instead of social capital, whereby the (embodied) cultural capital of a consultant represents all acquired knowledge, expertise and credentials (Levy & Reiche, 2018:868) that have been accumulated over time through inculcation and assimilation (see paragraph 4.6.3). This embodied cultural capital represents a specific cultural competence in the field of strategy making and therefore has an effect of broad legitimisation of the individual as professional consultant (Bourdieu, 1986). This may explain the difference between the work of the lowest level of the hierarchy (i.e. the more junior consultant) and the middle level of the hierarchy (i.e. the manager) in that consultants argue for a steep learning curve and work of the more junior consultants be constantly reviewed, guided and developed by the middle level managers or more senior consultants (“it is a big learning exercise, especially if you have not done it before”, “experience is key”, “senior levels are typically more experienced” and “they understand what the tricks of the trade are”). This theoretical explanation is not confined to only the possession of capital within the field, but it can also transcend to the notion of habitus, whereby Bourdieu (1990) argued that habitus is acquired over the long-term due to occupying specific positions in the social world and therefore varies according to the position that the individual occupies. Habitus is argued to be conditioned by the field

within which the individual functions, *and* the field is constituted by the habitus in a meaningful and sensible way (Ritzer & Stepnisky, 2014:522).

In pursuing an understanding of how the perceived superior status of the consultant in the broader field of strategy can be explained, we move towards the understanding of status and society through the works of Bourdieu (in Bourdieu & Wacquant, 2013) together with Brown (2007) and De Clercq and Voronov (2009). Bourdieu and Wacquant (2013) argue for a synthesis between the Marxist and Weberian perspectives of social divisions: the Marxist representation of class as modes of measurable existence (measured in the form of capital) and the Weberian representation of how individuals represent themselves in the social world, can present an explanation of social order. This social order is a stage of the positions of individuals in relation to their own “classifying classifications”. Bourdieu argues that these classifications focus on differences, rather than similarities and that the representations that individuals have, are depictions of habitus in terms of how they are expressed (Bourdieu & Wacquant, 2013:295-296).

Moving towards the view of the consultant’s superior status in the larger field of strategy within society, Bourdieu argues that the representation of classifications in the larger social structure of society can be explained by *symbolic* capital. By the aggregation of individuals’ contrasted classifications, self-representation as well as societal representation, this symbolic capital is defined in its embodiment of prestige, authority and status. The identified symbolic capital offers a “profit of distinction” within the larger society in the forms of both power and profit – but only on the prerequisite that this symbolic capital exists for and amongst those that are able to recognise the distinctive properties of capital as it is translated into expressed styles (Bourdieu & Wacquant, 2013:296-297). Bourdieu and Wacquant (2013:297) argue that practices that deliver signs of distinction in terms of their economic differences in relation to other practices, position them within a symbolic system of social practices that are arranged according to the distance or the gap between these economic differences. Considering this representational system of practices, this distinction in terms of the distance or gap allows for a practice to appear as necessity within the social formation of the system. We therefore argue that a practice with distinctive elements of economic value constitutes specific social *doing*, therefore that social doing or specific

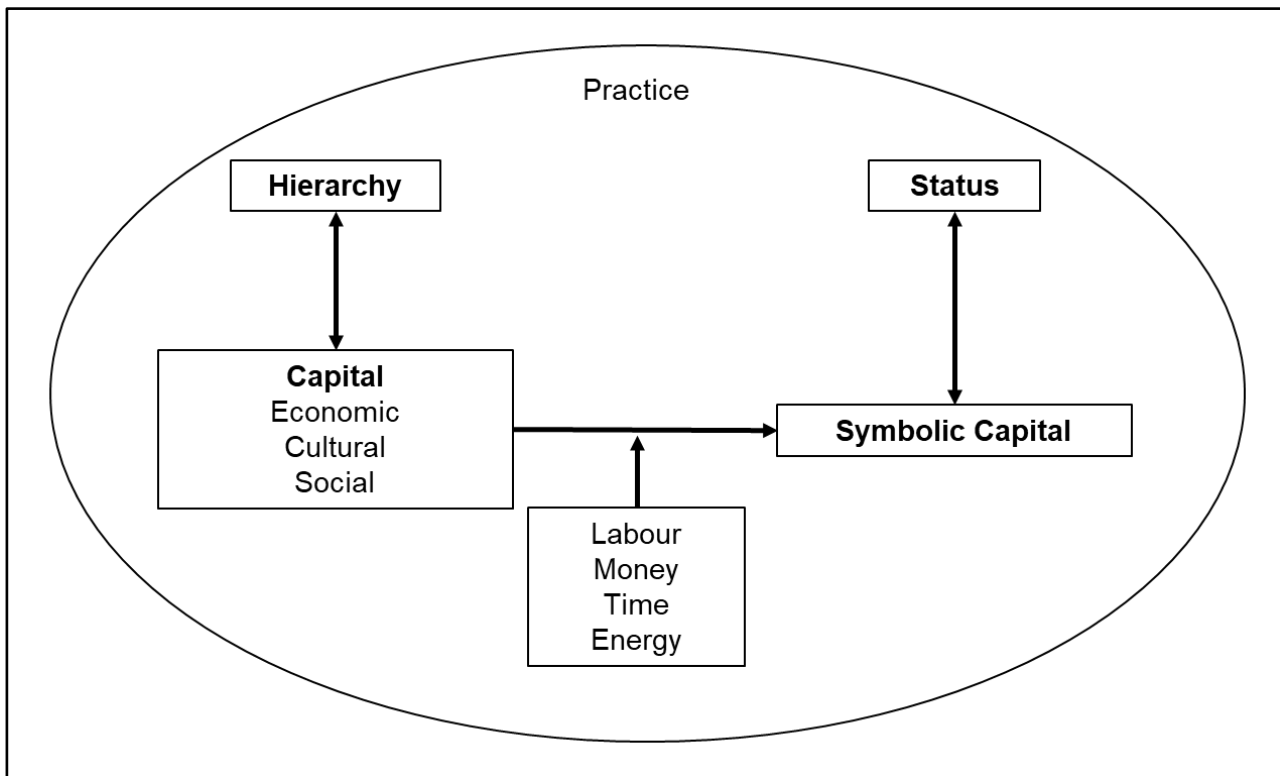
practice has higher perceived value through social stigmata of the perceived importance of that practice.

Bourdieu's explanation of prestige, authority and most importantly status is therefore a mere representation of how the professional field of strategy represents itself through the representations of the individuals who are situated within the field. Consultants therefore are assumed to possess significant symbolic capital as distinction to other professionals in the strategy field, which offers them a distinctive position in the representation of the strategy field. However, it does not answer the question as to how status is obtained and why consultants perceive themselves therefore as to possess a significant amount of symbolic capital. We therefore turn towards Bourdieu's explanation of how symbolic capital is acquired. Bourdieu (in Bourdieu & Wacquant, 2013:299) argue here that – for any type of capital to be transformed to symbolic capital there are four requirements:

- the activity of labour,
- a visible (and therefore measurable) investment or expenditure of time, money as well as energy, and in addition to these requirements
- it must be redistributed in a way that acknowledges or embody the distribution through a recognition of indebtedness by those who receive the distribution – this represents the value of the capital.

Bourdieu (2000:242) simplifies this notion of redistributed capital by describing that the prestige gained is a result of the value of capital being recognised in exchange. Therefore, consultants are perceived to acquire this status through transforming elements of capital that they might possess (whether cultural or social capital) into symbolic capital through the application of labour, time, money and energy in activities of transformation which results in the receiver of the distribution perceived as being obligated to pay for this distribution, as illustrated below in Figure 8.2. We argue therefore that consultants as a community of practice possess specific forms of capital that are acquired over time, which distinguishes them from other professionals within the strategy field. Their acquired cultural and social capital is transformed by applying activities concerning labour, money, time and energy (activity that is effected through the habitus of the consultants) into symbolic capital, therefore increasing their status as consultants and consequently their community of strategy professionals in the larger social system.

Figure 8.2: Status as symbolic capital



Source: Own illustration.

The knowledge around the perceived status of the consultant is important for both practice and theory, as it can be argued that the legitimacy of the consulting profession is determined by the way in which the consultant can appropriate symbolic capital within the field of strategy consulting. It is important, therefore, for consultants to understand and value their practices whereby they convert their cultural capital through the application of labour, money, time and energy (directed by their skills) into symbolic capital of distinct perceived value. Importantly, Strange and Sine (2002:498) argue that consultants formulate actions and interactions within the field of strategy based on the understanding they have of themselves, which opens several potential avenues for future research on the identity of the consultant in professional practice.

Based on this discussion of the consultant's status in a system of societal representation of practices of economic value, we therefore argue that the consultant's perceived professional status is determined by how the consultant (and the consulting firm) can transform and

appropriate symbolic capital to the client organisation through their strategic practices that they employ.

Proposition P⁴: A strategy consultant's perceived professional status is related to the amount of symbolic capital the strategy consultant can appropriate to the client organisation.

8.4.2.1 Hierarchy

Although the aforementioned discussion alluded to the hierarchical positioning of consultants within the consulting firm, it does not provide a detailed consideration of how hierarchies in firms and teams exist and why they exist in the way that they do. Continuing with the Bourdieusian perspective of practice as constituting habitus, capital and field, we can reach for a theoretical framework that might satisfy our explanation of the recurrent imitation of hierarchy in strategy consulting teams, mirroring the hierarchical structure of the consulting firm. Hierarchies in communities of practice, is not a new phenomenon and is found in a wide range of social organisations (Gould, 2002 in Levy & Reiche, 2018:868). Following Bourdieu's explanation of the ranking of hierarchies according to the capital that individuals possess within the field, Levy and Reiche (2018:870) furthers the argument to explain the specific configuration of this hierarchy as "objective relations between positions anchored in certain forms of power and capital". Therefore, we argue that this hierarchy of consultants exists as a representation of the manner in which measurable capital is distributed in the firm, echoing Webb *et al.* (2002:22). The higher the consultant is positioned within the hierarchy, the more social and cultural capital (relating to the strategy field itself) the consultant is assumed to possess. Importantly, as Gould (2002:1143) argues, the way in which consultants are positioned within this hierarchy also implies specific expectations, obligations and even rewards, which resemble the strong notion of responsibilities and roles that consultants expressed during their interviews.

8.4.3 Distinguishable skills

Schatzki (2001:12) argues that all activity in practice is strongly underpinned and driven by certain skills and understanding of the particular practice. This is no different for the field of

strategy as practice. Schatzki further argues that the skills and understanding of the practice is an important principle in the reproduction, maintenance and subsequent stability of practices. We therefore argue that the particular skills and abilities of the consultant as it emerged from the data (e.g. *quantitative skills, interpersonal skills, formal education and training and cognitive abilities*) is an important dimension to include in the search for the identity of the consultant in practice and therefore warrants further theoretical inclusion and investigation.

Within the broader practice theory, the notion of skills has seen a wide application and importance in practice literature, such as the analysis of skills in a community as an explanation for how order is constituted within the practice. Among several other contributions with regards to skills, Schatzki (2001:14) argues that order in practice is in fact a result of skills, interactions and interpretations. Skills have also been an important feature in shared activity in terms of underlying capacities among individuals, and several practice theorists have highlighted embodied capacities such as skills, particular know-how of things, dispositions and tacit understanding as important for understanding practice (Schatzki, 2001:16). Although some practice theorists such as Bourdieu argue that series of activity can be understood and explained by shared skills alone, others such as Giddens and Barnes have insisted that skills are supplemented by notions of goals, reasons and perception, among others (Schatzki, 2001:17). Schatzki (2001:31) argues though that the habituated skills of individuals in practice may contribute to our understanding of the routinised nature of practice, as certain practices (including strategising) is unlikely to be possible to perform with these shared skills (Schatzki, 2001:31).

The category of *distinguishable skills* that emerged from the empirical evidence of this study, relates to the distinguishable skills that participants identified not only as imperative for the successful practice of strategising, but also in terms of what distinguishes consultants as professionals from other professionals. We therefore conceive these skills to be distinguishable but shared skills that will contribute to skilful activity in the performance of strategising as a practice. Identifying and understanding these skills for strategy consulting is important as Barnes (2001:28) argues that a “successful” practice is characterised or portrayed as performance of an individual or a collective that has specific competencies. The dimension of distinguishable skills may therefore find theoretical relevance within

several areas of the emerged categories from this study, but its relation to the category of the identity of the consultant in professional practice can be quite fitting in the context of dimensions that constitute this identity of the strategy consultant.

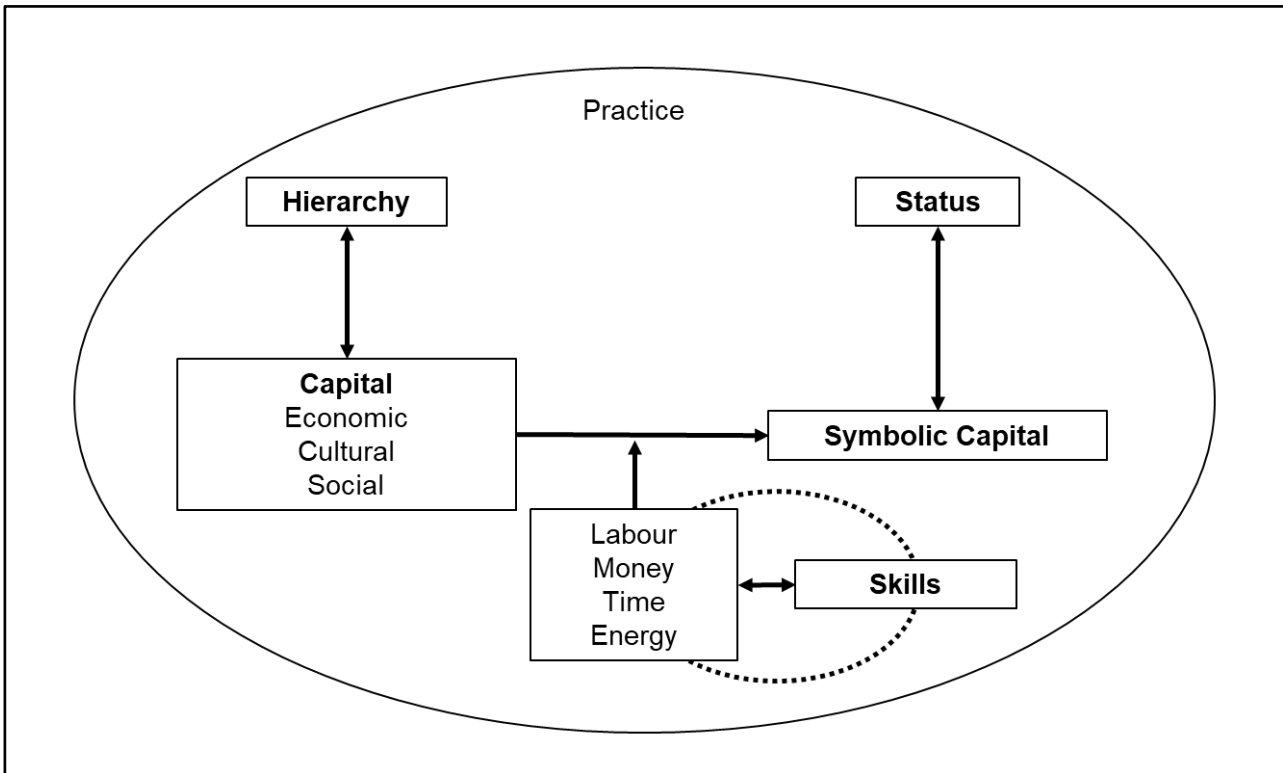
Building on the conceptualisation of the consultant's status as embodied symbolic capital (as illustrated in Figure 8.2), and the further theoretical argument that the capital possessed by the strategy consultant, consulting team or consulting firm must be converted to symbolic capital in order for value and subsequent status to be attributed. The notion of skills seems to be related directly to the mechanisms, or the activity that converts capital to symbolic capital (by using labour, money, time and energy). Therefore, we argue that the practices employed by the consultant to transform cultural capital (*habitus*) into symbolic capital through processes of activity or action, are underpinned and therefore influenced by the type of skills the consultant possesses in creating and maintaining a successful practice of strategising. If the consultant uses its underlying skills to enable a practice that converts cultural/social capital to symbolic capital, it means that the consultant skilfully applies labour, time and energy (activity). The importance of these skills as a distinguishable requirement for inclusion as a consultant in the community of strategy consultants, therefore, relates to maintaining the consistent, skilful effort of transforming this cultural and social capital to symbolic capital through the practice of strategising, which will – in turn – influence the status of the consultant, its team, its consulting firm and even the community of strategy consulting practitioners. It can thus be stated that:

Proposition P⁵: The transformation of cultural and social capital to symbolic capital is related to the underlying skills of the strategy consultant.

Proposition P⁶: The consistent transformation of cultural and social capital to symbolic capital is influenced by the skills that are shared among a strategy consulting team.

Figure 8.3. sets out to visually portray this relationship between the aforementioned dimensions of status, hierarchy and skills as they relate to each other in a conceptual framework based on practice-based theory of capital.

Figure 8.3: Relationship between status, hierarchy and skills



Source: Own illustration.

8.5 CATEGORY 3: CHOOSING STRATEGY TOOLS

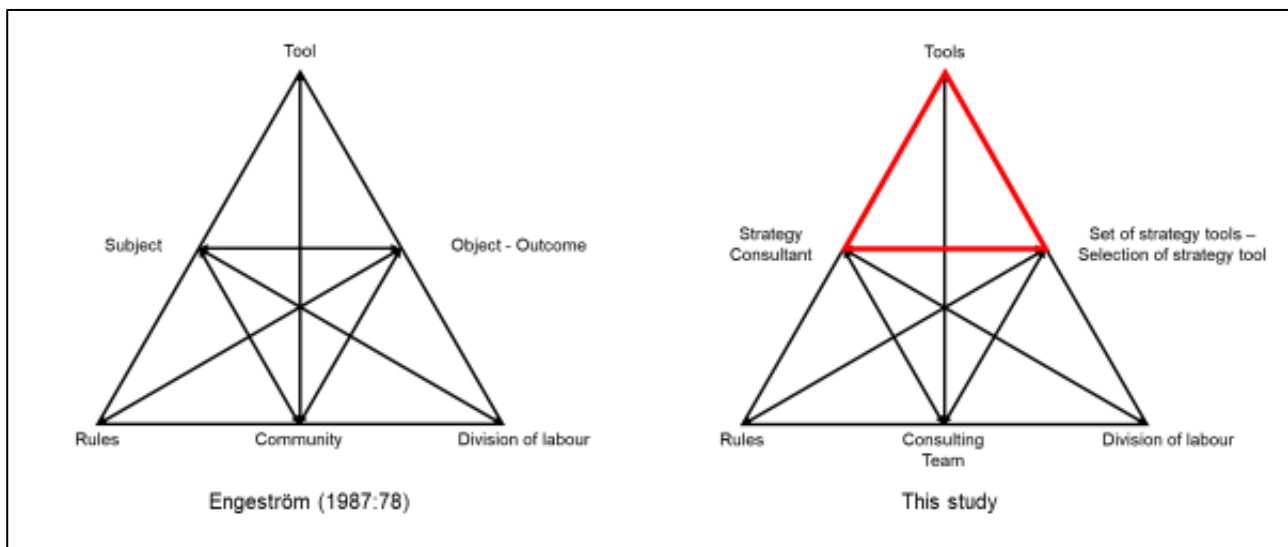
Throughout the data collection stage involving intensive interviewing using certain grounded theory strategies, participants frequently conversed around why they have chosen a specific strategy tool during a strategy consulting engagement. This focused the researcher’s attention on the emergence of consultants’ strategy tool selection strategies as emerging phenomenon, in an attempt to understand the interplay between consultants and their strategy tools. Three main reasons for choosing specific strategy tools emerged through a method of constant comparison, namely a *familiarity* with the strategy tool, selection for *purpose of strategic fit* and *imposed decisions*.

In considering a practice or practice-based theory which provides strong theoretical foundations for studying strategy as practice, the dimensions of choosing strategy tools seem to have a theoretical fit with practice-based activity theory – in particular Engeström’s (1987) extended activity system. Therefore, Engeström’s extended activity system is used to compare the selection of a strategy tool within the theoretical framework of an activity.

8.5.1 Choosing strategy tools as an activity

In conceptualising the selection of a specific strategy tool as an activity and according to the theoretical activity system framework, the subject-object oriented activity is constituted by the strategy consulting team (the norm rather than the exception) performing a selection activity towards a set of appropriate strategy tools. Here, an assumption is made that the set of strategy tools presented as subject is a set of strategy tools that inherits the potential to deliver the same or similar strategic outcomes for the consultant or consulting team, if used. The consulting team as object, conducts the activity by making use of certain tools, which embody the accumulated social and behaviour knowledge of the strategising practice in general through various material forms or in the form of knowledge. This basic activity is illustrated below in Figure 8.4 in relation to the original extended activity framework as proposed by Engeström' (1987).

Figure 8.4: Selecting a strategy tool as basic activity



Source: Comparison between Engeström (1987:78) and this study.

Considering that the selection of a strategy tool is an activity situated within an entire activity system, Engeström (1987) argues that this activity is mediated by the effects of the rules within the system, the community that forms part of the activity and the division of labour among the consulting team. In this activity system, the consultant applies goal-directed activity which is motivated by the underlying need for selecting an appropriate strategy tool

in order to conduct the strategy consulting episode accordingly. The way within which the strategy tool is selected, is influenced by the rules that exist in the activity system. Within this context, these will relate to how the individual (together with the collective) proceeds in selecting an appropriate strategy tool within their larger social and organisational contexts, such as the necessity to participate in tool selection as a functional responsibility in the profession of strategy consulting, the importance of understanding the subject-matter in order to make informed decisions, responding to instructions from other consultants who may act for the organisation as fulfilment of duties to receive monetary compensation, and the rules of engagement with another in terms of how the selection strategy is to occur.

Further, in this activity system the division of labour relates to the way in which the activity is structured between the individual consultant and the collective in terms of “who does what” and how the activity is executed in a purposeful manner. In selecting a strategy tool, the way through which the division of labour is executed may explain the roles and responsibilities the individual members of the team take on within this activity, such as the decision of who is leading the selection processes, simply taking minutes for future reporting purposes or a subject matter expert explaining the strategy tools in detail before the selection process proceeds.

8.5.2 Choosing strategy tools: an activity comparison

In order to further understand what shapes this decision-making activity and how this activity may differ when different underlying reasons for selection are presented, we can use the open codes of these dimensions to explore some of the detailed underlying behaviour which gave rise to the prominence of the three dimensions of *familiarity*, *purpose of strategic fit* and *imposed decision*, and relate these to each other.

In the *first* instance (familiarity with the strategy tool), it emerged from the grounded data that consultants may choose a specific strategy tool due to their personal affection with or knowledge of a strategy tool and may favour a specific tool in terms of individual or collective agency (the freedom to choose) of the consultant. Within the extended activity theory framework, we argue that this is a more subjective selection activity which arises from the cultural-historical situatedness of the knowledge of the consultant who partakes in this

selection activity. The situatedness of the consultant's knowledge in cultural and historical context (such as the presence of formal education, previous work experience or social circumstances), allows a strategy consulting team to have several sets of predispositions and frames of reference (*habitus*) to selecting their strategy tools, embodied by their personalised experiences to the social world through which they have been exposed to certain strategy tools.

It is important to note that this knowledge is not necessarily constrained to the knowledge of the strategy tool itself and the subject at hand, but the knowledge in the activity system is also related to the *habitus* of the consultant (see 4.6), which may be measured by the consultant in "what is common sense". This selection activity is therefore argued to be reliant on the existing, accumulated knowledge that the consultant may have with regards to the strategy tool, together with the internalised psychological or technical tools (represented by *tools* in the activity framework) available for the consultant, by which this activity is performed. Within this context, the consultant will therefore favour the strategy tool as response to a level of familiarity in the context of his/her accumulated knowledge of the strategy tool. We argue conceptually that this level of familiarity can be interpreted as being associated with some sort of predictability (i.e. producing the same results as before), which may have several underlying reasons, such as the avoidance of uncertainty, establishing structure in ambiguity (e.g. "pathfinding"), reduce uncertainty etc. The underlying assumption with this selection activity therefore is that the strategy tool has previously been assimilated and perhaps even internalised by the consultant or strategy consulting team over time or over repeated exposure to and use of the strategy tool. The activity is therefore characterised by the knowledge present within the activity system.

In the *second* instance of selecting a specific strategy tool based on the purpose of strategic fit, some of the detailed underlying criteria for this selection activity included the perceived practicality, simplicity, specificity, standardisation or potential for customisation of a specific strategy tool. According to the grounded data presented, this selection activity is based on the "fit for purpose" of a strategy tool, in other words the extent to which the strategy tool will satisfy the anticipated future outcomes of the strategy consulting engagement within the context it is presented in. Here, underlying criteria for selecting this strategy tool relates to how the strategy tool can be used or manipulated by the consultant and the strategy

consulting team in order to affect their strategising work during the engagement. Within this context, we argue for a more objective selection strategy that is effectively aligned with the anticipated outcomes, as opposed to the subjective strategy of choosing a strategy tool based on familiarity with the tool, in order to cope with the uncertainty of the engagement.

We argue conceptually that, for the consultant or the consulting team to enact this activity of selecting a strategy tool based on a “fit for purpose” criteria, the consultant or team is heavily dependent on (as per the first selection activity) accumulated knowledge about what constitutes “fit for purpose” in the context of the consulting engagement. We argue that the same cultural-historical situatedness of the knowledge, together with the internalised psychological or technical tools (e.g. the know-how of applying certain criteria to understand what, for example, practicality, simplicity and standardisation means within context) the consultant or consulting team possesses, is of relevance in this selection activity. However, since this selection activity leans towards an implied objective or seemingly rational decision, the activity system also suggests that the mediating component of rules of the engagement is considered and incorporated. Within the context of the consulting engagement, we conceptualise that these rules would relate to implicit and institutionalised practice of the strategy consulting environment, such as maintaining client-centred approaches in consulting work, that visual representations are institutionalised and preferred, that standardisation is important to ensure continuity for implementation teams, and that customisation allows for better understanding.

The *third* selection criteria relates to decisions that are seemingly imposed on the consultant or the consulting team by an external agent. Although the strategy consulting team may sometimes be observed to “choose” the specific strategy tool or methodology through a particular selection process, this strategy tool has either been predetermined by an organisational individual who exerts authority or formal power over the selection process such as a more senior consultant, manager or partner, or by the implicit or explicit rules in selecting the specific strategy tool, such as privileging strategy tools that may have been developed by the strategy consulting firm itself and is therefore the preferred strategy tool to use over the firm’s consulting engagements. This selection activity of a specific strategy tool is directed towards satisfying the implicit expectations or power the external authority has of the strategy consulting team and an alternative selection might be perceived as

deviant (i.e. operating outside of the institutionalised rules of the engagement) and will create tension within the activity system, and subsequently the practice. In the framework of the activity system, we argue that the consultant or consulting team’s knowledge or tools to enact the activity at their disposal is of less importance, and most likely not even considered (perhaps only in circumstances where deviation is recorded). The dominating mediator in this selection activity is argued to be that of the rules of the activity, i.e. the compliance to formal power in the organisation, which directs the outcome of the activity.

In understanding the differences between these three selection activities in the context of the extended activity system, these main differences can now be summarised as per Table 8.3 below. Note that the column “Strategy” is discussed after the introduction of the table in ensuing paragraph 8.5.3.

Table 8.3: Selecting strategy tools

Tool Selection Reason (focused codes)	Underlying Criteria (open codes)	Nature of decision	Main consideration (activity framework)	Strategy
Familiarity with strategy tool	<ul style="list-style-type: none"> • Formal Education • Previous use • Credibility 	Subjective	Knowledge	Reduce uncertainty
Purpose of strategic fit	<ul style="list-style-type: none"> • Practicality • Simplicity • Appropriateness/ Specificity • Standardisation • Customisation 	Objective	Knowledge, Rules	Achieve engagement outcomes
Imposed decision	<ul style="list-style-type: none"> • Senior management • Predetermined use • Institutionalised practice 	Imposed	Rules	Compliance

Source: Own data.

8.5.3 Choosing strategy tools: three selection strategies

Conceptualising the selection of a strategy tool as an activity conducted by the consultant (or consulting team), we conceptually deduce three selection strategies which differ in their nature, purpose and effect on the practice of strategising.

The first selection strategy pertaining to the familiarity with the strategy tool is conceived as a subjective strategy that is influenced and dependent on the accumulated knowledge that the community partaking in this activity may use to perform this activity. This knowledge may also be embedded in several different physical or cognitive forms and is therefore dependent on the way through which both the consultant within the team and the consulting team as collective will externalise this knowledge to influence the selection process. We argue, therefore, that this selection strategy represents a selection strategy based on *who* the consultant or the consulting team is rather than *what* they or the team does or should do, as is the case with the second and last tool selection activities. It can therefore be conceptualised as a strategy tool selection strategy with the aim of reducing uncertainty for the consultant.

The second, more objective selection strategy of purpose of fit may be argued to be influenced in the same manner as the first selection strategy, namely by the situatedness of the knowledge of the consultant. However, the activity of selection by hand of the workings of the activity system is not adequate to explain *why* the consulting team will favour the subjective strategy of selecting strategy tools as opposed to the objective strategy of selecting strategy tools. This selection strategy is rather centred around the *work* that the consultant or team does, rather than *who* the consultant is (as is the case with the first selection strategy). This activity therefore alludes to a strategy which is based on the rules of the engagement and therefore aimed at achieving engagement outcomes as defined by the client, therefore adapting the tool selection criteria according to the general rules of the consulting engagement, such as expectations and responsibilities, interpreted as “the way things work”.

The last selection strategy, that of an imposed tool selection strategy differs from the first two selection strategies in the sense that there is no actual object-oriented selection activity and a redundancy of tools/knowledge in the activity. It differs from the first two selection strategies in the sense that the activity cannot be explained according to *who* the consultant or consulting team is, nor by the *work* that the consultant or team does, but alludes to the issue of compliance in a formal power system according to the expectations and norms that exists in the activity system in the context of a professional, strategy consulting engagement.

8.5.4 Theoretical integration of tool selection strategies

In an attempt to correlate these findings to the existing theoretical framework of strategy as practice, the contribution of Jarzabkowski and Kaplan (2015) on strategy tools as “technologies of rationality” (see paragraph 5.5.2.1) becomes particularly insightful as one of the very few (if not the only) contributions that describe and explain strategy tool selection behaviour. Jarzabkowski and Kaplan (2015) considered the use of strategy tools as technologies of rationality based on earlier studies around the use of technology in organisations such as those of Orlikowski (2001) and Orlikowski and Barley (2001). In applying a practice lens to understanding tool selection among organisational actors, Jarzabkowski and Kaplan firstly incorporates theory on the conceptual and material affordances of tools, based on studies of similar tools and technologies. On the other hand, the practice perspective highlights the individuals who use strategy tools; therefore, they also incorporate the agency of actors who use tools (i.e. the strategy consultant) before conceptualising the selection, application and outcomes of strategy tools within the organisational context.

Their contribution differs, however, from the contextual setting of this study, which focuses specifically on the consultant as an external strategist to the organisation. Their analyses of these strategies are guided by hand of *affordances* and *agency*, in contrast to the *activity* that this study has followed. Remarkably, the emergent dimensions of this category bear great resemblance to the conceptual work of Jarzabkowski and Kaplan and therefore warrants a comparison between the findings. This study echoes their argument that there is no single rationale responsible for the selection of a strategy tool by internal or external strategists. This summary is presented in Table 8.4 **Error! Reference source not found.** below. Note that only the selection strategies (and neither application or outcomes) were extracted from Jarzabkowski and Kaplan (2015).

Table 8.4: Selecting strategy tools: integrating findings

Dimension	Associated Strategy	Comparison to Jarzabkowski & Kaplan (2015)
Purpose of strategic fit	Achieve engagement outcomes	Tool selection influenced by degree of simplicity
Familiarity with strategy tool	Reduce uncertainty	Tool selection based on satisficing (first tool that is familiar)
		Tool section of quantitative tools more attractive

Dimension	Associated Strategy	Comparison to Jarzabkowski & Kaplan (2015)
		Tool selection based on expertise power (competency)
Imposed decision	Compliance	Tool selection more dependent on organisationally standardised use rather than “fit”
		Tool selection based on formal power (hierarchy)

Source: Own comparison.

A brief analysis on the comparison between the findings within this study and those of Jarzabkowski and Kaplan (2015) yields a few interesting insights into the strategy tool selection strategies of consultants. Relating these findings to another assists in building on the current theory of strategy as practice authors such as Jarzabkowski, in an attempt to create contextual depth of strategising as practice. Jarzabkowski and Kaplan focuses on the affordances (materiality) of tools as well as the agency of actors, but this study illuminates a third conceptual area, which is the influence of *formal power* on the tool selection process, perhaps even more significant as it does not pertain to the organisational strategist, but the consultant as external strategist. It therefore relates not to the current context of strategising within the engagement of the client, but would rather be heavily dependent on the consulting firm’s organisational practice and representation of power through hierarchies. As we have already established the replication of hierarchies from firm to teams during consulting engagements, it might represent a way through which formal power is enacted even by those not directly participating in the actual strategising activities. This opens a plethora of questions with regards to strategy tool selection strategies, and how strategic practice of internal and external strategists would differ due to the different contextual dynamics of tool selection and ultimately, the strategy tool the consultant selects. It would be of great value to examine a larger pool of consultants over even more contexts, teams and firms and relate their selection strategy tools to the structures of *formal power* and hierarchy within their consulting firms and how these structures ultimately impact their strategising practices.

8.6 CATEGORY 4: ORGANISING INFRASTRUCTURE

Perhaps the most prominent category that emerged from the empirical data relates to the concept of *organising infrastructure* that consultants perceive strategy tools to have, specifically in what can be conceptually described as the creation of informative, efficient processes, activities and structures that provide a sense of stability, security and

calculatedness during their application within a strategy consulting engagement. Four dimensions of this concept of organising infrastructure have been deduced through the grounded theory strategy of constant comparison: *social organisation, prioritising strategic knowledge, compositional arrangements and processual arrangements*.

The category of organising infrastructure presented itself as an interesting, yet ambiguous and more abstract emergent category that embodied an element that was almost perceived by the researcher as the consultant's "little black book" or a "pocket directory": a metaphor that conceptually added security and structure to the way the consultant enacts the strategic activity of working with a strategy tool during a consulting engagement. Consultants described this concept in a sense that was constructive, helpful and almost preferred in navigating complexities in consulting engagements. Importantly, it seemed as if this organising infrastructure assists the consultant in finding a way through ambiguous strategic issues within the consulting engagement. In an elaborate search within the strategy as practice literature to find any theoretical contribution, explanation or framework that would account for the emergence of a concept such as organising infrastructure, the focus turns to four informative, helpful and relevant contributions that all partially inform the theoretical framework of this category.

The first contribution by Belmondo and Sargis-Roussel (2015), centres around the notions of language, meaning and intention of strategy tools as material technologies in the practice of strategy. Belmondo and Sargis-Roussel (2015) argue here that strategy tools as material objects are widely perceived to contain a certain set of embedded instructions that dictate the actions and intent of the tool user, and continue to link these properties of strategy tools with the concept of strategy objects which aid in transformation of strategy tools into an accepted outcome that is agreed upon by the collective, namely the strategy infrastructure (also see paragraph 5.5.2.6). The second, by Nicolini *et al.* (2012), centres around the role of material objects in collaboration between different professionals. Through adopting multiple theoretical perspectives, they argue that material objects such as strategy tools are not only limited to serving as boundary objects but can be transcended to be used as epistemic objects and activity objects. The work of Nicolini *et al.* (2012) is integrated into Belmondo and Sargis-Roussel (2015) as explanation of how processes of transformation may work in practice, but makes two other important contributions. Nicolini *et al.* (2012) also

argued that beyond the ability of material objects to allow participants to work across different types of boundaries, material objects also provide the motives for the emergence of collaboration and constitute the fundamental infrastructure of the activity within which it is used. The third contribution by Levina and Vaast (2005) hails from the knowledge management domain. Focusing particularly on boundary objects and boundary spanning in practice, it also incorporates those individuals that use boundary objects, called boundary spanners. Lastly, the contribution of Spee and Jarzabkowski (2009) which conceptualises strategy tools as boundary objects, provides very strong theoretical direction for the ensuing theoretical integration. Whilst only the work of Belmondo and Sargis-Roussel (2015) and Spee and Jarzabkowski (2009) focus explicitly on strategy tools, it provides the same theoretical underpinnings of both Nicolini *et al.* (2012) and Levina and Vaast (2005), who focused on the mediating role of boundary objects and boundary objects in practice. This section utilises both practice theory and boundary-object theory primarily from these four contributions in order to argue for a theoretical integration of the areas of *social organisation*, *prioritising strategic knowledge*, *compositional arrangements* and *processual arrangements* as organising infrastructure during a consulting engagement.

8.6.1 Sociomateriality and affordances of objects

Before we pursue a discussion on theoretical integration and developing a subsequent framework for the category of organising infrastructure, we briefly revisit important concepts and theory which may aid this process. In particular, we briefly focus on the role of objects in everyday social life (and subsequently, practice) and how objects (such as strategy tools) may create certain conditions through which collaboration can aid in creating coherence between different social worlds, such as bridging the world of the consultant with his/her client in another social domain.

Although the practice approach incorporates and acknowledges several theories (Reckwitz, 2002), all practice theories argue that social practices are materially mediated by different artefacts and objects (Knorr-Cetina, 2001; Schatzki, 2001). The increasing interest in the role of these artefacts and objects is due to the development of practice-based studies or the *practice turn* (Nicolini, 2011; Orlikowski, 2007), alongside the concept of sociomateriality of practices (Balogun *et al.*, 2014; Nicolini *et al.*, 2012). Orlikowski (2007:1437) argues that

this sociomateriality is fundamental in understanding practice as the “social and material are constitutively entangled in everyday life”. Objects perform important roles in social practice which is important to study and understand (Orlikowski, 2007). Because objects are used in enacting social practice, they are not only constrained by the actions and knowledge within the practice, but simultaneously constrains the actions and knowledge of the social practice (Reckwitz, 2002). Individuals may therefore use objects differently.

To explain this phenomenon, Leonardi (2011:153) uses the concept of affordances of objects to account for how the materiality of objects presents different possibilities for different users, based on the unique way through which the individual perceives the materiality of the object. However, these unique perceptions of how objects are to be used, present tension within the context where a collective is not only to use the same object, but to use the object the same way. In order to account for the way through which different individuals create certain conditions for collaboration through the use of a common object, Star and Griesemer (1989) developed the concept of boundary objects as a particularly prominent approach not only to understand materiality in organisations, but also in understanding how coherence between different social worlds can be developed and maintained.

Star and Griesemer (1989:393) define boundary objects as artefacts that “are plastic enough to adapt to local needs and constraints of the several parties employing them, yet robust enough to maintain a common identity across sites”. They are therefore characterised by their ability to serve as “bridges between intersecting social and cultural worlds” and create shared meaning among different groups in order to create a condition for collaboration (Nicolini *et al.*, 2012:614). When boundary objects are used, a common language between different users is negotiated, and the different knowledge it embeds through negotiation may differ but does not alter the object (Star, 2010; Star & Griesemer, 1989). However, not all objects are boundary objects in practice. Boundary objects are objects deemed flexible as they may have different meanings for different users such as professional groups or communities of practice, yet they are common enough to be recognisable amongst these groups that use them (Nicolini *et al.*, 2012:616). Boundary objects include artefacts and objects such as prototypes (Carlile, 2002), accounting ledgers (Briers and Chua, 2001),

processes (Swan, Bresnen, Newell & Robertson, 2007) as well as strategy tools (Spee & Jarzabkowski, 2009).

8.6.2 Strategy tools as boundary objects

Strategy tools can be conceptualised as boundary objects as they enable both the sharing and integration of specific strategic information between users within an organisation (Chesley & Wenger, 1999; Grant, 2003), much to the characteristic of boundary objects enabling the integration of specific knowledge over boundaries of practice (Spee & Jarzabkowski, 2009:228). They are used to stimulate interaction between various participants of strategising and for shared meaning to emerge (Kaplan, 2008) and may only be perceived as useful in strategising once they are used (Levina & Vaast, 2005), as opposed to acting as mere repositories for shared language and knowledge (Star & Griesemer, 1989). In acting as boundary objects, strategy tools enable social interaction and the integration of strategic ideas between different individuals within the organisation (Spee & Jarzabkowski, 2009:228). In using boundary-object theory, we can explore how strategy tools may have different interpretations (Sapsed & Salter, 2004), and how it may translate to the flexibility as well as the interpretative scope of a strategy. In addition to enabling interaction across boundaries, boundary objects could potentially reveal the more complex social and political boundaries between groups of users and the role of power and politics in strategy processes (Spee & Jarzabkowski, 2009:229).

In line with the affordances and materiality of objects and consequently strategy tools as objects in practice, Belmondo and Sargis-Roussel (2015) set out to examine how strategists use strategy objects to seek agreement on the issues of knowledge and intention for the collective use of a strategy tool. They explore the three processes of negotiating for common language, meaning and intention through primarily adopting boundary-object theory. However, Nicolini *et al.* (2012:612) argue that by adopting different theoretical lenses, it may become apparent how the function of an object in practice may change due to the nature of both the object and the activity through which it is used in practice. This argument stems from criticism by scholars such as Zeiss and Groenewegen (2009) who argued that boundary object theory cannot account for all transformative processes. Nicolini *et al.* (2012:614) therefore utilises theoretical lenses from scholars such as Rheinberger, (1997)

and Kaptelinin and Nardi (2006) to deduce four approaches to the changing roles of objects. These four approaches present four complementary theories that may explain the changing roles and include boundary, epistemic, activity and infrastructure objects (Nicolini *et al.*, 2012). Belmondo and Roussel (2015) utilise the boundary-object perspective for understanding how language is negotiated through abstraction and specification (2015:96). To account for the negotiation of meaning through contextualisation and de-contextualisation, Belmondo and Sargis-Roussel (2015:98) argue for the use of strategy objects as epistemic objects as Nicolini *et al.* (2015) deduced from Rheinberger (1997), and for the negotiation of intention through distortion and conformation argue for the role of strategy objects as activity objects in practice as argued by Kaptelinin and Nardi (2006). Belmondo and Sargis-Roussel (2015) incorporates these three perspectives of Nicolini *et al.* (2012) to explain the way through which strategy objects are able to transform strategy tools into strategy infrastructure that acts as an agreed upon outcome of consequent strategising, as illustrated previously in Table 5.2.

This contribution is important in that it establishes the necessity of strategy tools to be transformed in order to be useful and relevant to the strategising process within the collective. In the same sense that Belmondo and Sargis-Roussel (2015) argued for the transformation of strategy tools to strategy infrastructure through the use of strategy objects that may take the role of boundary, epistemic or activity objects. Similarly, we argue that the use of strategy tools by consultants within a consulting engagement necessitates the transformation of these tools to stimulate social interaction between consultant and client and to create shared understanding of the strategy that is developed during a consulting engagement. However, we incorporate only boundary object theory as a departure point for the theoretical integration of the category of organising infrastructure.

8.6.3 Boundary spanning in practice

The next important contribution from Levina and Vaast (2005) adopts a broader practice perspective in that they approach the examining of boundary objects in practice between different fields rather than different groups, and therefore adopt the concepts of field and capital from Bourdieu and Wacquant (1992) to conceptualise the use of boundary objects. Although their contribution is situated within the knowledge management domain and

centres around creating a competitive advantage for the organisation through sharing knowledge, it accounts for the necessary theoretical assumptions to allow the integration of the category of organising infrastructure and provides a helpful theoretical foundation.

Firstly, they highlight the different roles that boundary spanners (individuals that perform boundary spanning activities) may perform, such as an ambassador or guard (Ancona & Caldwell, 1992) or advice broker (Friedman & Podolny, 1992) – much to the like of the strategy consultant in practice. Levina and Haast (2005:339) further distinguishes between two types of boundary spanners: nominated boundary spanners and boundary spanners-in-practice. The boundary spanners-in-practice are the individuals who engage in negotiation to establish meaning and terms off artefact use across different groups or organisational boundaries (see paragraph 8.6.1 above). Levina and Haast (2005) argue for another important contribution which resonates with the findings of this study (see paragraph 8.4.2) as it pertains to status, hierarchy and the possession of symbolic capital by consultants. They argue that individuals that possess power in a particular field may use their symbolic capital to designate a specific artefact to be used for boundary spanning activities, but these artefacts may not always become actual boundary objects used in practice, therefore distinguishing between designated boundary objects (chosen tools) and boundary objects-in-use (used tools). Objects only become boundary objects-in-use once they acquire a common identity that spans across two fields and the emergence of these are entangled with the emergence of a field that is both new and joint between the original two fields (Levina & Haast, 2005:341). This assumption becomes the second important theoretical element in the integration of the category of organising infrastructure.

8.6.4 Theoretical integration

To progress this integration of the category of organising infrastructure and its four dimensions, we turn to the work of Bourdieu and Wacquant (1992) and their work around the emergence of fields in practice. Webb *et al.* (2002:21) define field as “a series of institutions, rules, rituals, conventions, categories, designations, appointments and titles which constitute an objective hierarchy, and which produce and authorise certain discourses and activities”. Within the context of this study the field refers to the field within which strategy is practiced, particularly with reference to the rules and the institutionalised

practices that constitute strategy (Webb *et al.*, 2002). Field can also be used to describe a group of professionals who share a specific practice and is structured accordingly in spaces of positions (Gomez, 2011), such as the strategy consulting field or strategy consulting team in the context of this engagement. The consulting team and its members are members of the strategy field through their formal designations in the team (which resembles a community of practice), their titles and responsibilities within the hierarchy, the activities and the discourse (Webb *et al.*, 2002:21) which all forms part of the consulting engagement.

In a similar sense, we conceptualise the organisational client and the individuals involved in the consulting engagement as another, distinct field that specialises in a different discipline and consists of members of another community of practice. Therefore, two distinct fields of professionals exist within the consulting engagement, that of the consultant and its team members and that of the client and its individual members. Consultants within the strategy consulting field will transform their capital – specifically their cultural capital as experts with status within the strategy field and transform this cultural capital to symbolic capital through the delivery of strategy expertise for the client (see paragraph 8.4.2). To achieve this transformation, consultants will use strategy tools as strategy objects in pursuing agreed upon strategic decisions or outcomes for the client.

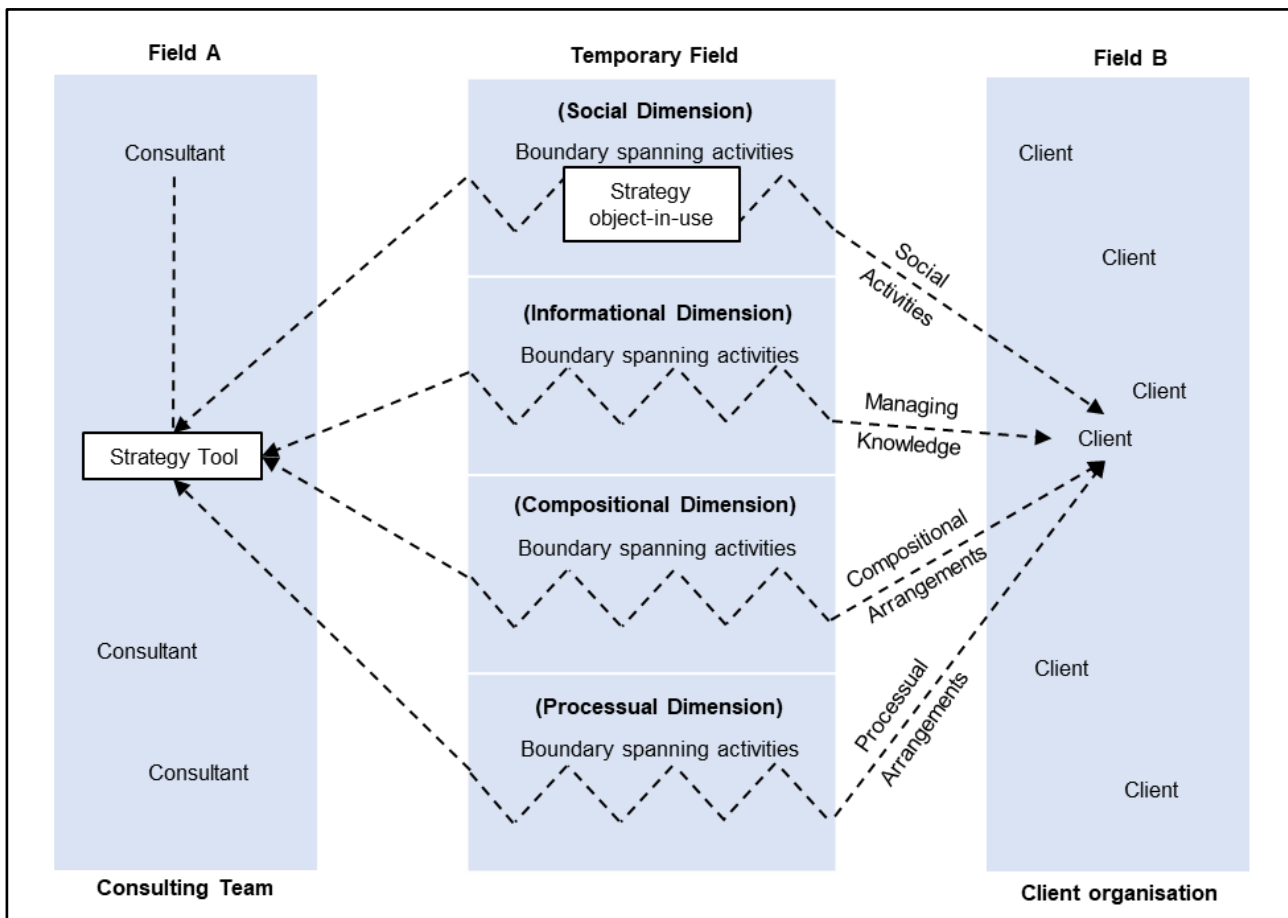
Taking into consideration the conceptualisation of strategy tools as boundary objects, consultants as boundary spanners therefore use these strategy tools during an engagement to conduct boundary-spanning activities between themselves and the client organisation (Belmondo and Sargis-Roussel, 2015; Levina & Haast, 2005; Spee & Jarzabkowski, 2009) in the pursuit of these strategic outcomes, and through this process create a temporary, new joint field within which they use these boundary objects to negotiate for common direction and intent (the strategic outcomes) of the strategy consulting engagement (Levina & Haast, 2005:339). The participating consultants as boundary spanners-in-practice using strategy tools as boundary objects-in-use, use these strategy tools to progress negotiations for strategic outcomes through constant engagement, enactment or performance of specific activities or actions, finding a local usefulness for the strategy tool by systematically making sense of the strategy tool within its local context (Levina & Haast, 2005:354), in a similar nature to the transformation of strategy tools to strategy infrastructure through strategy objects as described by Belmondo and Roussel (2015).

The category or concept of organising infrastructure therefore finds specific relevance within this context of boundary spanning in practice, with an emphasis on the boundary-spanning activities that occur. The four associated dimensions of organising infrastructure alludes to the existence of boundaries or dimensions within which boundary spanning activities are constructed or enacted – the conceptual, overarching domain of these activities is represented by the new, temporary and joint field within which the boundary spanning activities take place. It is within this temporary field, mediated by strategy objects-in-use that boundary spanning activities occur over various dimensions in pursuit of shared meaning and the integration of strategic ideas. Drawing from Nicolini *et al.* (2012) in their argument that strategy tools in this temporary field will constitute the fundamental infrastructure of the activity within which it is used, we contribute to this argument by highlighting that this fundamental infrastructure is situated over four dimensions – those identified in this study as social organisation, prioritising strategic knowledge, compositional arrangements and processual arrangements. These four are introduced as the underlying dimensions that provide the motives on particularly how strategy tools allow for collaboration to emerge and how activities are constructed. This conceptualisation of organising infrastructure in the context of boundary-spanning activities, the theoretical integration and conceptual framework is subsequently illustrated below in Figure 8.5.

In keeping with the recommendations of a grounded theory approach and its application of theoretical coding families (Glaser, 1978) as the third round of coding, we analytically sharpen these four areas to a family of dimensions through further abstraction:

- The social dimension
- Informational dimension
- Compositional dimension, and
- Processual dimension.

Figure 8.5: Organising infrastructure as boundary spanning activities in four domains



Source: Own illustration.

The social dimension of organising infrastructure is argued to represent the extent to which the fundamental infrastructure of the boundary spanning activities represent certain social phenomena, specifically with reference to negotiating a strategic outcome through the use of a particular strategy tool. Within this social dimension, the consultant as individual or consulting team as collective in their field of practice will utilise the chosen strategy tool as the strategy object-in-use, and use it to stimulate, guide and structure their boundary spanning activities as per the intent of the strategy tool. An example of such a boundary spanning activity is the identified social activity of *collaboration*, an activity through which the consulting team engages with a client and uses the affordances of the strategy tool to determine the nature of how to engage with the client. This can include identifying particular client representatives to engage with, engaging through social activities with the client in order to complete certain areas of the tool with input from the client, working alongside client representatives to negotiate different areas of the strategy tool or using *brainstorming* as a social technique or activity to elicit specific strategic knowledge deemed important or

appropriate by the client. It is important to note that the open coding of the data in this study did not necessarily yield or define specific social activities, but alluded to the presence of the social dimension as abstracted through focused coding.

The informational dimension of organising infrastructure is argued to represent the extent to which the fundamental infrastructure of boundary spanning activities determine how strategic information or strategic knowledge is gathered, included and utilised, specifically with reference to negotiating a strategic outcome with the use of a particular strategy tool. Within this informational dimension, the consultant as individual or consulting team as collective in their field of practice will utilise the chosen strategy tool as the strategy object-in-use, and use the language and knowledge of the strategy tool to pursue the integration of strategic ideas and strategic outcomes through local contextualisation of the strategy tool. Consultants described the presence of this dimension as the way through which they are able to utilise the affordances of the strategy tool to frame the strategic information or strategic knowledge that was appropriate to pursuing strategy infrastructure. Consultants referenced situations where they utilised the strategy tool to enable the client to conceptualise intended outcomes of the strategy tool, how the strategy tool as repository served as a point of reference in evaluating the appropriateness of elicited strategy information and how the strategy tool is utilised as a boundary object to create shared understanding of specific concepts in pursuing strategic outcomes.

The compositional dimension of organising infrastructure is argued to represent the extent to which the fundamental infrastructure of boundary spanning activities aids in how strategy infrastructure is ultimately composed. The compositional dimension relates specifically to how consultants use the affordances of a strategy tool to compose the nature of their consulting engagement with the client in terms of negotiating the inclusions and exclusions (scope) of the engagement. In this sense, the scope of the consulting engagement seems to be closely tied to the selection of the strategy tool, particularly in articulating how the strategy infrastructure is idealised or conceptualised to be constituted, even before common intent and outcome is negotiated. This differs somewhat from the current boundary object theory as introduced above.

In this light, this dimension opens another argument pertaining to the transformative processes that happen in the practice of strategising, particularly with reference to the transformative processes of strategy tools to strategy infrastructure as an agreed upon collective outcome. We argue that within this context, strategy infrastructure is not necessarily shaped or determined by the nature of the transformative processes in terms of how strategy objects-in-use may alter the strategy infrastructure. Rather, as strategy infrastructure may be already conceptualised or idealised at the onset of using the strategy tool by the field of consultants, the extent to which the other dimensions of organising infrastructure is represented or construed during the engagement is influenced by the nature of the idealised strategy infrastructure, pre-determined by the consultant or consulting team. Consultants may use this envisaged or idealised strategy infrastructure to carefully influence negotiation processes through applying or transforming their symbolic and/or cultural capital. In this sense, consultants do not only use symbolic capital to select or nominate certain strategy tools as boundary objects (see paragraph 8.6.3), but may also use their symbolic capital to influence the negotiation processes for developing appropriate strategy infrastructure through the extent to which they interpret and apply the affordances of the strategy tool as boundary object-in-use.

Lastly, the processual dimension of organising infrastructure is argued to represent the extent to which the fundamental infrastructure of boundary spanning activities constitute the sequence of the transformative processes through which strategy infrastructure is negotiated. The processual dimension relates to how consultants use the affordances of a strategy tool to determine or negotiate sequential activities within the consulting engagement that would allow for negotiation of the strategy infrastructure. Within this dimension, consultants may use the strategy tool to determine how sequential activities are performed as embedded by the intent and direction of the tool, particularly in how and in what sequence negotiation activities are performed and how interim outcomes or strategy infrastructure is pursued. It is this processual dimension of fundamental infrastructure that affords consultants their perceived methodological rigidity and structured approaches to consulting engagements.

8.7 CATEGORY 5: INFORMATION FINDING

The emergence of the category of *information finding* illuminated the importance of information finding as a fundamental, ongoing strategising activity that provides functional links as enabler to several other activities within strategy tool use and the broader consulting engagement process. Through employing the grounded theory strategy of constant comparison, three properties of the broader concept of information finding emerged: the *activities* usually employed for finding strategic information, the *sources* of strategic information gathered and the *dimensions* of the strategic information finding process. The activity of finding information was seen to occur at various times throughout the consulting engagement at various frequencies, by utilising different methods or approaches for finding information from various sources. In a search for existing theory that may aid in exploring and analysing the category of information finding, we turn to practice-based activity theory as progressed by Engeström (1987). In order to provide an appropriate theoretical basis for theoretical analysis of this category, we briefly revisit the most important theoretical concepts and assumptions in activity theory as it relates to the category of information finding.

8.7.1 Activity system theory

The broader activity theory provides an intuitive way for conceptualising activity and the relationship between the subject and object of activity. Human beings use tools or technologies (psychological or technical) tools to interact indirectly with the social world around them and they are able to accumulate and transmit knowledge through these tools (Kaptelinin & Nardi, 2012:11,13-15). Within the context of this study, Engeström's (1987) extended activity system framework provides a useful theoretical explanation of consultants using strategy tools as mediating artefacts, and also incorporates the concepts of *rules* and the *division of labour*, which presents a theoretical foundation of how consultants utilise strategy tools to achieve strategic outcomes for the client.

As illustrated earlier in Figure 4.3, the community as a social collective within which the activity is situated is represented by those partaking in the activity (i.e. the consulting team and the client), whereby the interaction of the individual consultant within the consulting team is mediated by the rules that establish and control the actions towards the subject of activity

and towards other consultants or clients partaking in the activity, as well as the division of labour (or work), which mediates how the consulting team divides the work to be conducted according to the intent of the strategy tool (Kaptelinin & Nardi, 2012:33-35). Adopting an activity system theory perspective for the ensuing theoretical discussion provides several useful theoretical underpinnings and assumptions within the strategy as practice context. Engeström's (1987) theoretical framework is appropriate for theoretical analysis of the category of information finding as it emphasises practices, foregrounds the role of artefacts such as strategy tools in mediating activity and also incorporates how language plays a role in mediating activity within the collective (Blacker, 2009:30-33). Adopting Engeström's (1987) extended activity system framework, we aim to firstly conceptualise information finding activities as activity systems and apply this theoretical framework to explore and analyse the several identified information finding activities before a subsequent comparison and analysis of these activity systems.

8.7.2 Information finding activities as activity systems

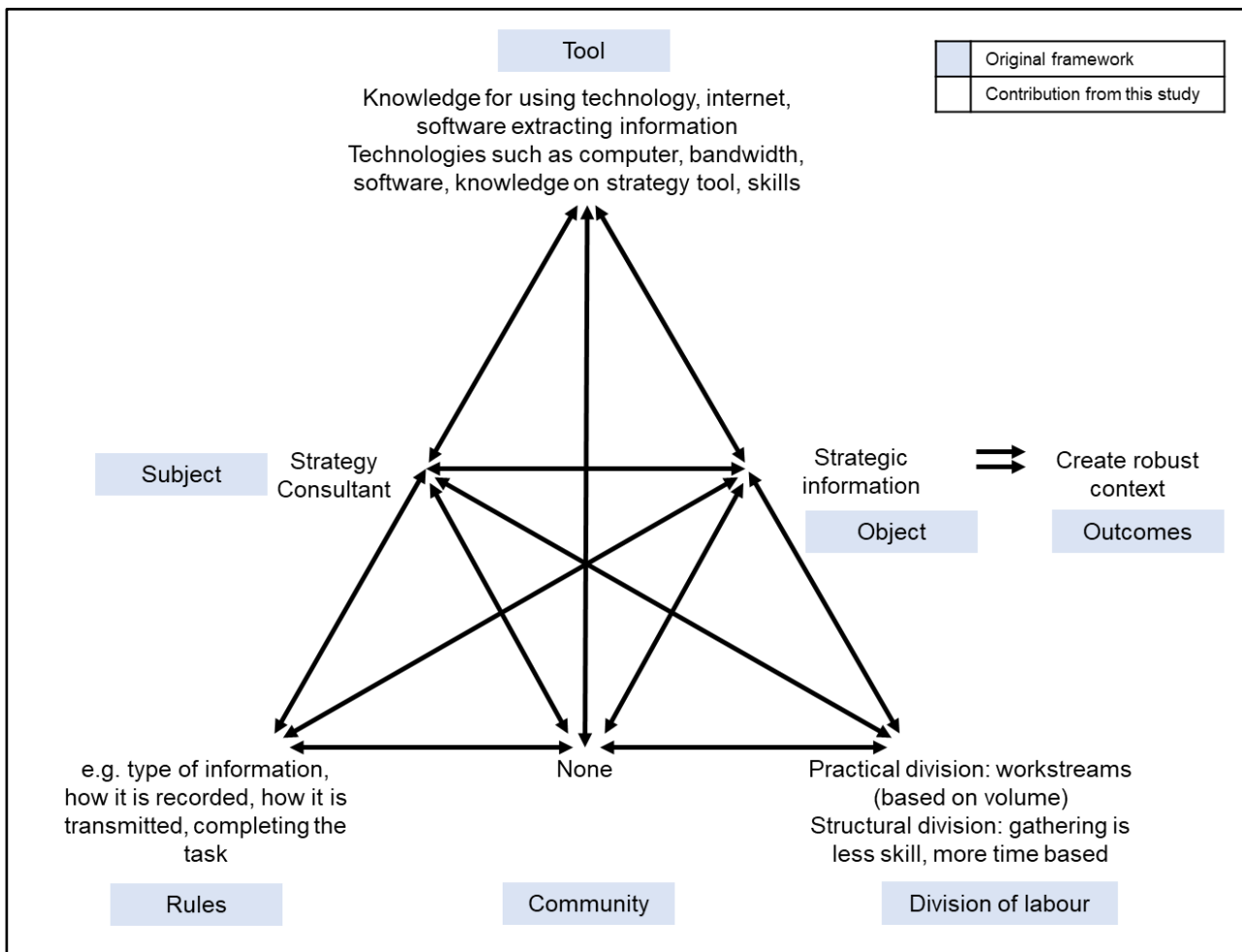
Each of these five activities that emerged as dominant activities for strategic information finding whilst using strategy tools can be visually illustrated by adapting Engeström's (1987) extended activity system which accounts for the rules of the activity, the community participating within the activity as well as the division of labour. It is important to note that the elementary concept of tools and the mediating concepts of rules and division of labour are interpretive inclusions from both anecdotal and empirical evidence and are not to be conceived as exhaustive.

For the first activity of researching (see Figure 8.6 below), the activity is oriented towards the strategic information the consultant as subject is presented with. Using the theoretical structure of Engeström's (1987) activity system framework, we accordingly adapt the components of all ensuing frameworks in this section to fit the context of this study. In the case of researching as information finding activity, the subject is not the source of information, as the source of information merely presents a technology to display the strategic information, such as a database or a computer screen displaying a website, or presenting a chapter in a book related to the subject-matter. Therefore, the mediums through which the strategic information is distributed therefore are only technologies, which require

tools to mediate the interaction between the subject and the strategic information, such as the knowledge on using a specific technology, knowledge on how to use specific software on a computer, and knowledge on how to navigate the internet.

In the instance of researching, the community of others is usually absent. The presence of a community in this instance seems to be counterintuitive, the subject is directly engaged with the strategic information as object, drawing upon specific goals and subconscious operations in reading, classifying and extracting the information through the activity of researching. It may even be argued that the presence of a community in this instance may create tension in the activity system, altering the outcome or context of the activity. However, the subject's engagement with the strategic information is mediated, as it is influenced, directed or even structured by the embedded characteristics, knowledge and intent of the strategy tool and its inherent ability to provide the fundamental infrastructure for strategic activities of consultants. The motivation for this subject-object oriented activity is to search for strategic information, whereas the consultant pursues an outcome of creating robust context in order to prioritise strategic information for inclusion or exclusion within the strategy tool the consultant is using.

Figure 8.6: The Activity of Researching

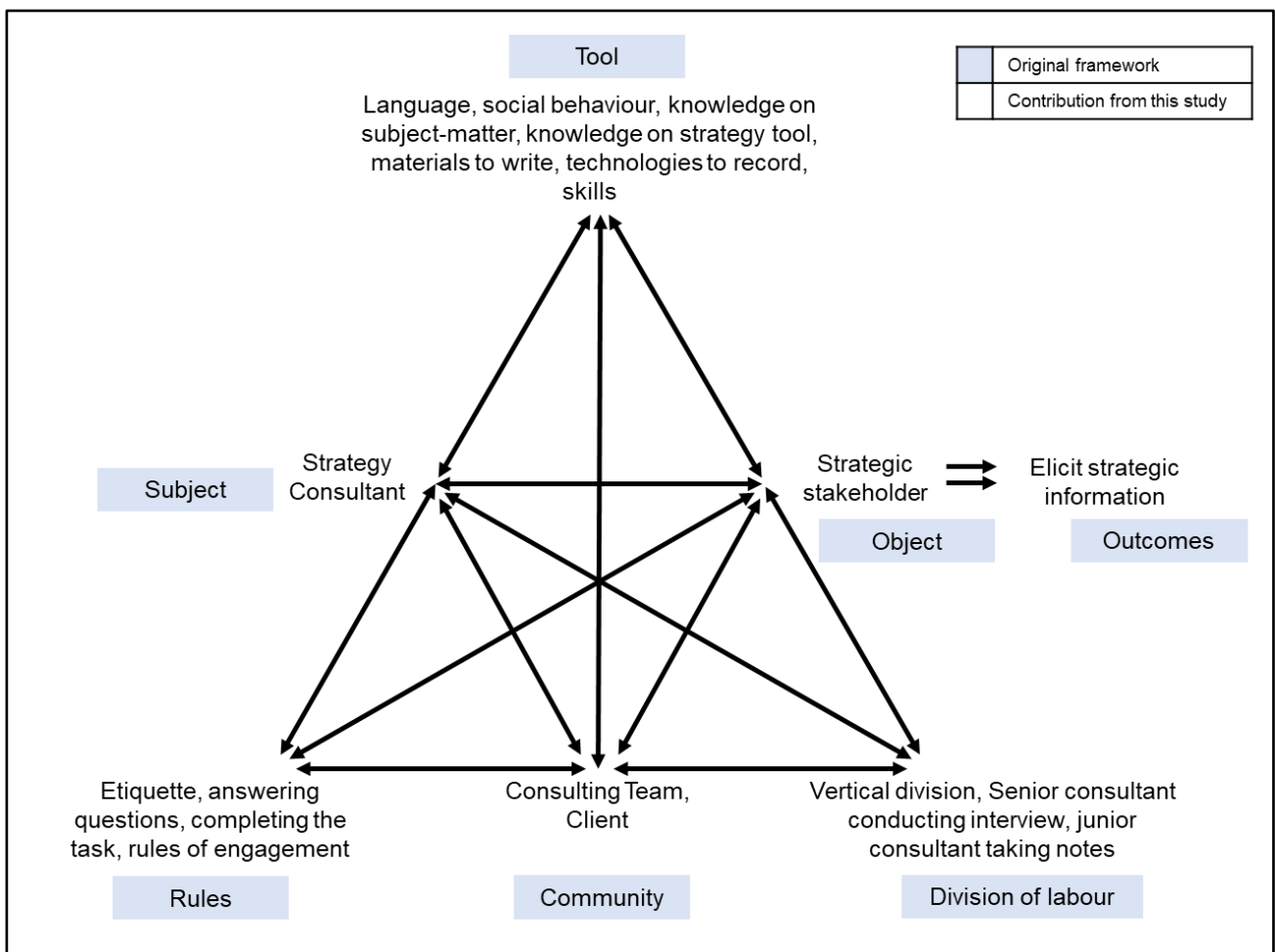


Source: Based on Engeström (1987:78)

The next activity of interviewing (see Figure 8.7 below) is a subject-object oriented activity whereby the need for the activity is to engage a client representative as stakeholder in order to elicit strategic information from that stakeholder. The interaction or activity between the consultant and the stakeholder is influenced by several mediating tools, such as the language used between the consultant and the stakeholder, the type of social behaviour the consultant is to adopt, knowledge on the subject-matter, knowledge and understanding of the strategy tool the consultant is using and other technologies such as materials to write or make notes or technologies such as a dictaphone to record the conversation for subsequent analysis. The outcome the consultant is trying to achieve is to elicit strategic information: it can be noticed how the subject of the activity of researching now becomes an outcome, rather than subject.

For this activity of interviewing, the consultant has to follow the rules of the larger field of interviewing: this may include the rules of social etiquette, the necessity to ask or answer questions, the reasons for completing the task, the overarching rules of the engagement, and the institutional guidelines of both the consulting team as well as the client organisation. For this activity, the community may participate in either an active or passive way within the activity of interviewing by assuming different roles, all of which are mediated by the rules of the engagement. The division of labour occurs mostly in a vertical fashion representing managerial lines (Foot, 2014): empirical evidence has shown that the more senior consultant may take on tasks such as leading, directing or conducting the interview whilst the more junior consultant could participate or even only take notes of the strategic information elicited.

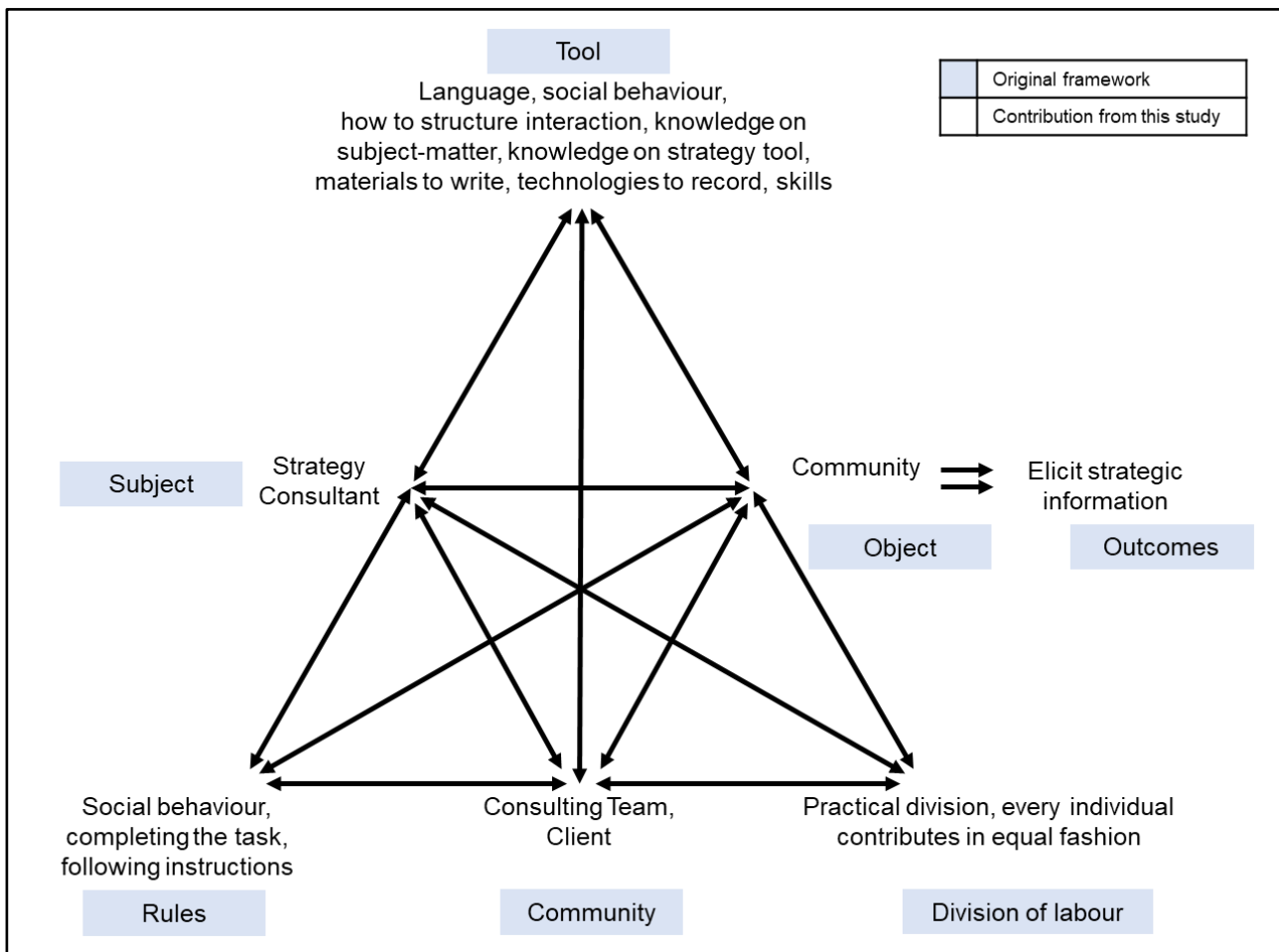
Figure 8.7: The Activity of Interviewing



Source: Based on Engeström (1987:78)

The following activity of conversing to elicit strategic information (see Figure 8.8 below) is a subject-object oriented activity which follows the same general structure as the activities of researching and interviewing, as described above. Again, the consultant performs a stakeholder-oriented activity with the outcome of eliciting strategic information. The rules for this activity of conversing remain the same as for interviewing, although it may be applied in a more informal or relaxed manner, relating to the property of dimensions of the activity of information finding in Table 7.5. Notably, for the activity of conversing, is the absence of the community and the division of labour. From the empirical evidence, informal conversing with clients usually occurs on an individual basis due to its informal, unscheduled and more sporadic and unstructured fashion as opposed to interviewing. As there is an absence of community, there is also no division of labour to mediate the relation between the community and the object. However, the rules of the activity will remain in existence as the rules are crucial for the consistent duplication of the activity from one subject to another, or from one object to another exchangeable object, or from one context to another.

Figure 8.9: The Activity of Brainstorming



Source: Based on Engeström (1987:78)

8.7.3 A theoretical analysis of information finding activities

Considering the activities of researching, interviewing, conversing, workshoping and brainstorming in their visual activity system formats as illustrated above, allows for a theoretical comparison and analysis between the activities in terms of the subject, object and outcomes, with a specific focus on the primary relation to the strategy tool which forms part of the tools that the object and community will use in performing the activity.

Table 8.5 below illustrates this comparison, from which we will aim to deduce conceptual potential relationships between these activities and their relation to the strategy tool that the consultant or consulting team has employed to assist in the practice of strategising. The activities are compared in terms of the subject (who performs the activity), the object (to whom the activity is directed, represented by the need for the activity), the outcome of the

activity, and lastly what can be conceptualised as the primarily relation of the strategy tool as a mediating artefact of the activity, resulting in how the activity is performed. In the illustrations above, the strategy tool is not necessarily foregrounded as the only artefact that mediates the activity, but forms part of a larger set of tools and artefacts, including skills and knowledge.

Table 8.5: A comparison: Activities and strategy tool

Activity	Subject	Object	Outcome	Primary relation to strategy tool
Researching	Strategy Consultant	Strategic Information	Create robust context	Knowledge
Interviewing	Strategy Consultant	Strategic Stakeholder	Elicit strategic information	Language
Conversing	Strategy Consultant	Strategic Stakeholder	Elicit strategic information	Language
Brainstorming	Strategy Consultant	Community	Elicit strategic information	Structure

Source: Own analysis as derived from the study.

As illustrated in Table 8.5, the subject of all five activities has been identified as the consultant. Three different objects were identified: strategic information, strategic stakeholder (client) and community of strategy practitioners. Two types of outcomes are prominent: the first is creating a robust context for prioritising strategic information, the second is to elicit strategic information. In terms of the primary relation of the activity to the strategy tool used, this discussion takes a very conceptual, theoretical approach to determine the relation between the activity itself and the strategy tool as mediating artefact, by drawing on the empirical evidence of this study.

In the first activity of researching, the consultant – through direct activity with the subject – is guided intensively by the knowledge the consultant has of the subject-matter in terms of what type of strategic information is included or excluded from the activity of finding strategic information through researching. Although the consultant has to perform the activity according to the rules of the larger environment within which the consultant is conducting the research, adhering to the rules becomes more of an institutional responsibility than a conscious, motivation-directed activity. Here, mediating tools, artefacts and technologies become a much more prominent influence on the activity of the consultant than the rules of

the activity. The focus on the selection and extraction of strategic information is conceptually much more dependent on what the consultant believes to be the most appropriate, relevant and useful strategic information which will satisfy all or most of the predefined outcomes of the strategy consulting engagement. This largely depends on the knowledge that the consultant has on the subject-matter, how to extract this strategic information through applying artefacts and technologies to the activity, and how to enable subsequent detailing of the strategy tool itself.

Within the second and third activities of interviewing and conversing, the consultant – in engaging directly with the strategic stakeholder as object, directs all activity towards the stakeholder in order to elicit specific strategic information through the activity of interviewing or conversating, whereby the only difference is the formal or informal dimension of the activity. One prominent tool that mediates the activity between subject and object is the use of language, not only the language relating to the culture of both subject and object (i.e. speaking French or English) but also the language relating to the subject matter in context (i.e. strategic concepts, *in vivo* concepts and organisational language). Considering all other potential artefacts, tools and technologies the consultant might use to interview or converse with the stakeholder, most might be rendered irrelevant if the subject-object activity is not sustained by using and understanding the same language. Even if the consultant abided by the rules of the activity in terms of how to engage with the strategic stakeholder, eliciting information to enable activity for others, delivering the labour for monetary compensation, and following the rules of strategising, the activity will render no outcome of eliciting strategic information if not mediated by language.

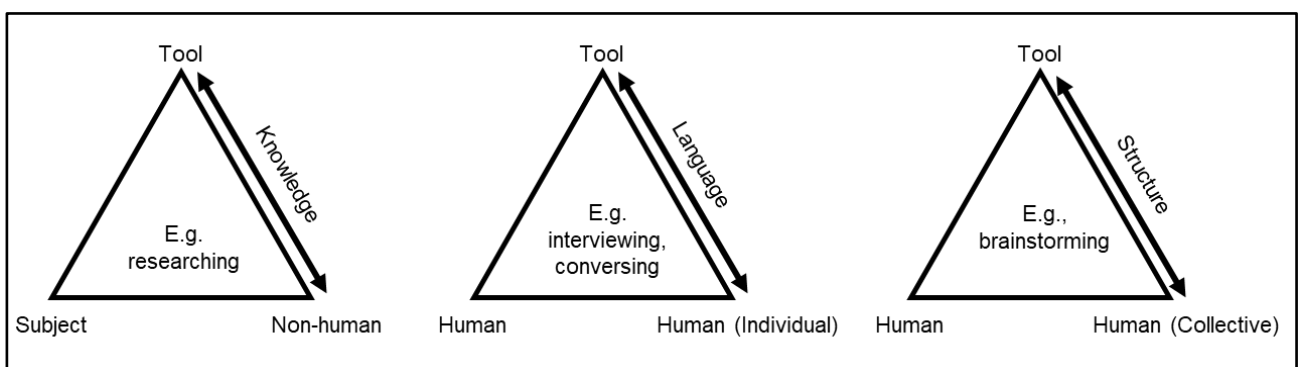
For the fourth activity of brainstorming, the consultant directs activity towards the community as object in order to elicit strategic information from the community as need for the activity. The only difference between workshopping (previously abandoned) and brainstorming in the context of the activity system, is seemingly the way in which the labour associated with the activity is divided and structured between the community (as between interviewing and conversing).

The last consideration would therefore be the most prominent relation to the strategy tool that forms part of the larger set of tools, artefacts and technologies employed. Considering

that the strategy tool – in providing a prominent framework – strongly organises how information is structured in terms of the social, informational, compositional and processual arrangements within the strategy tool as an overarching framework or methodology (see Table 7.4 and paragraph 8.6.3), one can conceptualise that this ability of the strategy tool to provide or direct social, informational, compositional and processual arrangements strongly influences the way workshopping and brainstorming activities are structured in terms of how the activity is to be directed or sequenced.

From the empirical evidence, notions of how strategic information is physically and virtually composed, which theoretical or practical foundations are to be considered or pursued, and which components or areas of interest (context). have emerged from information finding activities of consultants in practice. Therefore, composition – and subsequently structure – becomes a prominent influence of the strategy tool on the activities of workshopping and brainstorming. In an attempt to conceptually synthesise the activity systems of activities that consultants use in finding information with strategy tools in practice, Figure 8.10 presents a comparison between the three main types of activities that emerged in terms of their relation with strategy tool-in-use, i.e. knowledge, language and structure. We can therefore conclude and argue for a few theoretical propositions that emerged from this comparison.

Figure 8.10: The influence of strategy tools on activity



Source: Own illustration

Firstly, with reference to the context of information finding, all subject-object oriented activities in the form of human-non-human oriented activities, are subject to be moderated by the knowledge the consultant has on the specific strategy tool that the consultant has employed. One can therefore argue for the following theoretical proposition:

Proposition P⁷: Within the context of information finding, human-non-human oriented activities are moderated by the accumulative knowledge the strategy consultant has on the specific strategy tool.

Secondly, again with reference to the context of information finding, all subject-object oriented activities in the form of human-human oriented activities where the subject is an individual, are subject to be moderated by the embedded language of the specific strategy tool that the consultant has employed. One can therefore argue for the following theoretical proposition:

Proposition P⁸: Within the context of information finding, human-human (individual) oriented activities are moderated by the embedded language of the specific strategy tool in use.

Lastly, again with reference to the context of information finding, all subject-object oriented activities in the form of human-human oriented activities where the subject is a collective, are subject to be moderated by the structure of the specific strategy tool that the consultant has employed. One can therefore argue for the following theoretical proposition:

Proposition P⁹: Within the context of information finding, human-human (collective) oriented activities are moderated by the structure of the specific strategy tool in use.

8.7.4 Sources of information

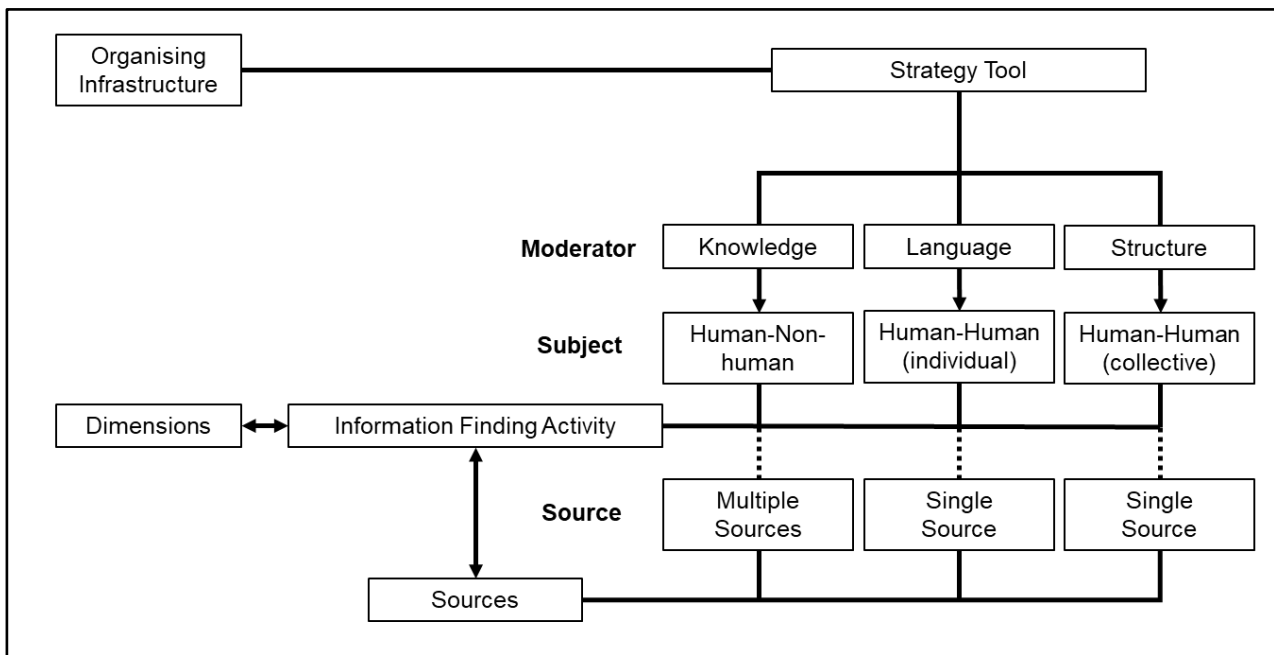
In the consultant's pursuit of finding strategic information as directed by the strategy tool employed by the strategy consulting team, the consultant will engage in several activities for finding information (as illustrated previously). Another dimension that emerged from the category of information finding, was the sources of information that the consultant may use or engage with during these information finding activities. Sources of information differ from the activities of information finding in the sense that a source of strategic information within a specific activity, merely represents the format of specific strategic information, such as the perusal of an electronic spreadsheet with sales data during the activity of researching. In

relation to the discussion above in the theoretical context of the extended activity system, we can deduce that the sources of information in subject-object oriented activities in the form of human-human (individual) and human-human (collective), is represented by the subject itself and can therefore not be substituted with other sources of information. Should the source of information change, so would the subject have to change. Dependent on the type of substitution, the activity system as a whole would then be altered and the nature of the activity as it is performed will change, resulting in a different outcome. In contrast with the human-human oriented activity and sources of knowledge, the third information finding activity presented in the form of human-non-human, the subject – which is the strategic information itself, may be presented or extracted through various media or technologies, whilst the non-human subject of strategic information remains the subject of the activity. Changing the non-human subject in this instance, may alter the activity system as a whole, in the same fashion as human-human oriented information finding activities and may result in a different outcome.

8.7.5 Activities, sources and dimensions of information finding

Considering the construction of information finding activities within the theoretical framework of an activity system as proposed by Engeström (1987) and understanding the way how information finding activities are directed in the broader practice of strategising – particularly when using strategy tools – a conceptual scheme can be developed that represents the category of information finding activity and the relationships between its subcategories or properties of activities, sources and dimensions. Whilst the sub-category of dimensions presents a complex area which warrants further exploration in relation to using strategy tools, the empirical evidence did not yield sufficient insight to incorporate this sub-category into the activity system or other practice theories of information finding activities. The following schematic conceptual representation is therefore presented in Figure 8.11 below and briefly discussed after.

Figure 8.11: Information Finding and Strategy Tools



Source: Own illustration

As illustrated in Figure 8.11, the category of information finding in the context of consultants using strategy tools, illustrates the way in which consultants conduct specific activities in order to gather strategic information for a variety of outcomes such as strategic decision making, problem solving or strategic planning purposes in practice. It presents important findings for the strategic management literature in the sense of understanding of strategy tools and the effect(s) they have on activities within the activity system, in how strategy tools may be reconsidered, redeveloped or redefined for application in practice by a wide community of consultants in professional practice.

For example, let us consider the use of the well know SWOT analysis (matrix) as a strategy tool, which is a popular, institutionalised and commonly found strategy tool for prioritising strategic information within the four dimensions of organisational strengths, organisational weakness, environmental opportunities and environmental threats. A consultant who applies the SWOT matrix in practice and decides to apply this matrix within a formal interview with a strategic stakeholder (with the aim of eliciting strategic information for subsequent prioritisation and potential analysis), is heavily dependent on the affordances and the constraints offered by the language that mediates activity between the consultant and the strategic stakeholder. If either the consultant or stakeholder speak different cultural languages, or have different interpretations, ideas and conceptions as to what each of the

components of strengths, weaknesses, opportunities and threats entail within the contextual understanding of the strategising episode (the strategy consulting engagement), tension will be created between object and subject which may lead to a distortion in the outcome of the activity. Distortion may lead to the consultant recording incorrect strategic information, or misunderstanding of the subject's input or feedback as data or even a distortion in the rules of the activity system, which would require entire realignment of the activity system in order to produce the appropriate strategic outcomes.

CHAPTER 9: CONCLUSION

The research objective of this study was to generate or build onto theory that will contribute to understanding the interplay between strategy consultants and their use of strategy tools as strategic practice in their everyday strategy consulting work. The study adopted the exciting and relatively new theoretical perspective of strategy as practice as part of the broader practice turn in the contemporary social sciences. The study applied the qualitative methodology of grounded theory, particularly the grounded theory strategies, to deduce conceptual categories that may aid in explaining the relational phenomena between consultants and their use of strategy tools in the practice of strategising. In adopting a fresh perspective on strategy through the lens of strategy as practice, the study yields several insights into practical strategising (i.e. the doing of strategy) in contemporary organisations by illuminating what strategy as practice scholars have termed the “black box” (Schmid *et al.*, 2010) of the organisation. Although not free of limitations (both practical and inflicted) such as limitations by institutional prescriptions, practical limitations in terms of time and resources available, choice of an appropriate methodology to best satisfy the research objective, access to a variety of respondents and the actual context within which the study is conducted, the study contributes in exciting and innovative ways to a contemporary understanding of strategising and strategy consulting, particularly the way in which we can conceive the work of the prestigious strategy consulting professional.

9.1 MAIN FINDINGS OF STUDY

Through following the methodically rigid approach of grounded theory and consistent application of its associated grounded theory strategies to assist in grounded enquiry, the study produced five relevant theoretical categories that are grounded within the empirical evidence collected through intensive interviewing of eleven strategy consultants. The inclusion criteria for the final theoretical categories pertained to their relevance in understanding the interplay between strategy consultants and the strategy tools they employ on a daily basis in their strategy consulting work (also referred to as engagement). By applying grounded theory strategies such as coding, constant comparison, theoretical sampling, theoretical sensitivity and theoretical saturation, the methodology yielded the five theoretical categories of: a definition of strategy consulting, the strategy consultant in

professional practice, selecting strategy tools, organising infrastructure and information finding.

The first category of a definition of strategy consulting yielded empirical evidence that allowed for the expansion of the current definition of strategy consulting. This category yielded four dimensions that constitute strategy consulting: *as a function, an industry, a subject and an engagement*. As the strategy as practice perspective does not necessarily see strategy consulting purely as an activity of economic exchange but rather as a social activity or social practice that is underpinned by the actions, interactions and behaviour of the strategist as individual, the study incorporates the dimension of strategy consulting as both a function and an engagement and leans towards the definition of strategy consulting as an engagement. Incorporating the theoretical perspectives of Reckwitz (2002), Nicolini (2017) and Schatzki (2002) on practice, the study conceptualises strategy consulting according to the result-oriented (strategic) outcomes of interactions between the individual strategist, its use of strategic practices as well as the context within which these strategic practices occur and subsequently refine the definition of strategy consulting to incorporate the concept of strategy consulting as an artful praxis of strategic engagement that spans over a specific period of time.

The second, related category of the professional identity of the consultant in practice yielded four properties that contribute to the understanding of the identity of the South African strategy consultant, specifically from the perspective of the consultant. Through abstraction of these properties to the concepts of *distance, status, structure and skills*, the study was able to theoretically integrate these four properties relating to the identity of the consultant alongside existing practice-based theory within the strategy as practice domain. Firstly, we identify the consultant in a similar notion as the *Simmelian stranger* as developed by Simmel (1950) and consequently incorporated into the work of Nordqvist and Melin (2008) and Nordqvist (2011) in their description of the strategy consultant in a family business. Through adopting this perspective of the consultant, we can further understand how the perceived metaphorical proximity of the consultant in practice could potentially influence strategic outcomes, as well as the strategic knowledge that is produced during a consulting engagement. This is important in practice as the *Simmelian stranger* concept implies that the consultant must achieve balance between closeness and distance to the organisational

client in order to continuously exert influence on strategic outcomes within the client organisation.

In this light, Schulze *et al.* (2003) have demonstrated how an imbalance between consultant and client may potentially hamper the development of strategic ideas. Furthermore, by adopting a Bourdieusian perspective on how consultants achieve a superior status as strategy professional, the study illuminates how consultants as strategists distinguish themselves from other professionals by their accumulation of capital, whether it be cultural or symbolic capital. Consultants transform their cultural into symbolic capital through the broader art of strategy consulting and are able to mobilise labour, time, money and energy to enact this conversion to symbolic capital. Importantly, the legitimacy of the consultant in practice remains dependent on how the consultant can appropriate symbolic capital in the practice of strategising, which is in turn dependent on how the consultant formulates actions and interactions based on how he/she understands him/herself (Strange & Sine, 2002). Through this same perspective, this study is also able to illustrate –in line with the same Bourdieusian perspective – how strategy consulting firms and consulting teams continuously replicate the same power structures through their engagements by arranging themselves according to their measurable capital within the broader firm of consultants, alongside their specific expectations and obligations (Gould, 2002). Lastly, the study draws a conceptual link between the distinguishable skills of the strategy consultant and the ability to convert cultural capital to symbolic capital in maintaining legitimacy and status in the broader field of strategic practice.

The third category of selecting strategy tools distinguished between three strategy tool selection strategies that consultants employ within a consulting engagement. Firstly, consultants may choose a specific strategy purely based on their familiarity with and previous exposure to and use of a strategy tool. Secondly, consultants may select a strategy tool based on the perceived strategic fit of the strategy tool with the anticipated or idealised strategic outcomes the consultants are pursuing within the consulting engagement., and lastly, the selection and use of a strategy tool can be an imposed decision, made by a party external to the consulting team such as an executive or regulatory body. By adopting an activity-theory framework and analytically comparing the three tool selection strategies according to the underlying decision making criteria, the nature of the decision and the main

consideration or mediator in terms of the activity framework, we conceptually derive three strategies for selection of strategy tools during a consulting engagement: a strategy tool selection strategy that aims to reduce uncertainty, a strategy tool selection strategy that aims to satisfy or achieve idealised engagement outcomes and a strategy tool selection strategy that aims to enact compliance to authority. We continued with a theoretical comparison between the findings of this study and those of Jarzabkowski and Kaplan (2015) and found that the third strategy tool selection strategy represents an additional conceptual area, which is represented by the influence of *formal power* on the strategy tool selection process. The emergence of this dimension provides opportunities for future research between formal hierarchy structures in consulting firms and how these formal power structures influence strategising activities during a consulting engagement, and subsequently the strategic outcomes pursued for the client.

The fourth category of organising infrastructure yielded four dimensions that have been deduced through the grounded theory strategy of constant comparison: *social organisation*, *prioritising strategic knowledge*, *compositional arrangements* and *processual arrangements*. To pursue theoretical integration and a framework for understanding this category, we abstracted these four dimensions at hand of a coding family of *dimensions* as suggested by Glaser (1978) to render the analytically sharpened dimensions of social, informational, compositional and processual dimensions. By drawing from practice and practice-based theories and the work of Belmondo and Sargis-Roussel (2015), Levina and Vaast (2005), Nicolini *et al.* (2012) and Spee and Jarzabkowski (2009), we used the theoretical underpinnings of the conceptualisation of strategy tools as boundary objects. Incorporating the conceptual and theoretical elements of *field*, *strategy tools*, *strategy objects*, *strategy objects-in-use*, *boundary spanners* and *boundary spanning activities*, we argue for the existence of boundary spanning activities over these four dimensions of social, informational, compositional and processual activities. These four dimensions are argued subsequently to represent the extent to which the fundamental infrastructure (Nicolini *et al.*, 2012) is represented. In explaining how consultants utilise strategy tools as objects-in-use to negotiate for common meaning and intent through the consulting engagement.

In pursuit of an idealised strategy infrastructure (the agreed upon strategy tool as collective outcome), the consultant will use strategy tools as strategy objects-in-use to compose and

structure activities, interactions and actions according to his/her understanding of the strategy tool in use. This category of organising infrastructure is of importance in practice as it illustrates how different consulting engagements may be differently composed and sequenced based on the perceived affordances and interpretation of the strategy tool by the consultant and the consulting team as collective. Our findings also highlighted that the transformation of strategy tools to strategy infrastructure through the use of strategy objects (Belmondo & Sargis-Roussel, 2015) does not necessarily happen in a linear fashion, but that consulting engagements may be planned, constructed and sequenced according to a pre-conceived idealised strategy infrastructure, which may not necessarily represent common intent. It also illuminates the role of power and symbolic capital in strategising, particularly with reference to the influence of the consultant on consulting processes and activities during a consulting engagement.

Lastly, the category of information finding yielded interesting perspectives on how the information finding activities of consultants are moderated by specific features or perceived affordances of the strategy tool as material artefact in performing the activity of information finding. By incorporating Engeström's (1987) framework of the extended activity system, we were able to conduct theoretical analysis between the different information finding activities identified within the study and found that the information finding activities of consultants during a consulting engagement can be categorised into three unique, conceptual activity systems that differ in the way through which knowledge, language and structure take centre stage as moderators of information finding activities in practice for each of these activity systems. In pursuing theoretical integration between information finding activities, sources of information and dimensions of information in the broader use of strategy tools, we provide a conceptual framework of how different object-subject oriented activities are differently moderated by knowledge, language and structure.

9.2 CONTRIBUTION AND OPPORTUNITIES FOR FUTURE RESEARCH

The study contributes to the broader strategic management literature by providing an alternative perspective on strategy. In particular, it contributes to generating new knowledge about strategy consultants and strategy tools through adopting a strategy as practice lens. Rooted within the social sciences, a practice perspective provides new in-depth, rich,

qualitative information about the interplay between strategy consultants and the strategy tools that they use in their everyday strategy consulting work. By applying the strategy as practice paradigm or perspective, the study contributes to a relatively new area of empirical investigation within the strategy as practice domain. The study provides an academic contribution in at least three very distinctive and important ways:

- Firstly, the study applied a relatively new theoretical paradigm called the strategy as practice perspective which is rooted in social sciences (Vaara & Whittington, 2012:286). The practice perspective provides new ways of analysing and understanding the phenomenon of strategising and therefore contributes to a new way of understanding strategy as a practice under the broader strategy literature.
- Secondly, the study employed the lesser known, qualitative methodology of grounded theory to investigate the interplay between strategy consultants and their strategy tools. Strategy as practice scholars such as Langley (2014) have argued for the importance of the interpretation of strategists' verbal account of their strategic practice in empirical investigation, and grounded theory is well positioned to produce new knowledge through intensive interviewing of strategists. Grounded theory as methodology possesses the ability to provide new theoretical categories or concepts with their associated properties and/or dimensions that are firmly rooted in the empirical data obtained directly from strategists.
- Thirdly, the study focused exclusively within the South African context of strategy consulting, an area that is not only neglected, but on which very little theoretical and empirical knowledge exists. There has been a recent uptake of the strategy as practice perspective among South African scholars, such as (but not limited to) investigating how South African middle managers perceive their strategic roles within their respective organisations (Jansen van Rensburg, Davis & Venter, 2014), understanding the impact of managerialism on university managers and their strategy work (Davis, Jansen van Rensburg & Venter, 2016) and exploring the strategising practices of chartered accountants within the South African mining industry (Grebe, Davis & Odendaal, 2016). However, there are no known studies in a South African context that adopt the strategy as practice perspective and focus on South African strategy consultants. The study therefore contributes to generating and building theory that may refine existing theories and provide contextual understanding of local academic relevance. Strategy consulting (including management consulting) has become a more prevalent and specialised

professional service in South Africa in recent years. The consulting industry has perhaps seen more unfavourable publicity in recent years due to the involvement of larger consulting firms in controversial South African government projects (Bogdanich & Forsythe, 2018), but their popularity and prominence seem to be on the increase as many historically financial service-oriented firms such as Deloitte and PriceWaterhouseCoopers (PWC), have (alongside a plethora of smaller, boutique-type niche consulting firms) entered the consulting market, offering their professional consulting services to various industries (PWC, 2019).

The findings and theoretical integration of these five core categories that are grounded in empirical data illuminates a plethora of future research opportunities within the field of strategy practice with a particular focus on the current knowledge of strategy tools as they are used by strategy consultants. Firstly, taking an ethnomethodological approach to studying strategy consultants may yield further rich, descriptive data that may be more accurate and relevant in the context of understanding the micro activities and efforts in the strategising work of consultants. The second area for further research pertains to the identity of the strategy consultant in practice. The strategy as practice literature casts its net wide over the definition of “practitioner” as it pertains to strategy, i.e. identifying who is a strategist. Much of the literature has focused exclusively on the organisation and its broader strategic influencer such as those employees at the periphery of the organisation, including middle managers. However, less focuses on the strategy consultant as external practitioner of strategy and though much is known about the work of strategy consultants, much less is known about how strategy consultants use and whether their approaches, methods and application of strategy tools yields optimum outcomes for organisations.

Thirdly, the study opens several questions pertaining to the mechanisms through which strategy consultants are able to legitimise themselves as strategy professionals. Research from a client-perspective on contracting consultants, experiences with them and analysing their strategy work from this perspective may yield insights that will either enhance or challenge current theory around transformation of capital to achieve legitimacy. Furthermore, the distinguishable skills of strategy consultants as it pertains to their identity as strategy professionals may be analytically sharpened by analysing these from a demand perspective. Fourthly, the study illuminates the dimensions of boundary spanning activities

when using strategy tools as boundary objects in practice, allowing for the intense studying of the micro activities that contribute to the social, information, compositional and processual dimensions of boundary spanning activities and how it influences the practice within new, emergent and joint fields of practitioners. Comparing several cases of how these new, joint fields emerge, may present great insight into the mechanisms and dynamics of the nexus of strategic practice and how it is enacted within this new field. Lastly, the research into information finding activities opens us new questions with regards to the role of knowledge, language and structure in using strategy tools, especially in comparing the moderating effect of these over several cases of different strategy practitioners.

9.3 LIMITATIONS OF THE RESEARCH

It should be acknowledged that this study had several important possible limitations which were identified during and after the completion of the study. Only the most significant and apparent limitations are discussed below.

The first limitation of this study pertains to the institutional prescriptions for academic research, specifically on a doctorate degree level. With the strategy as practice paradigm rooted in social sciences, it tends to adopt hybrid or borrowed methodological approaches that are perhaps more pragmatic than what institutional requirements express for the management sciences. Tension arises between institutional prescriptions and pragmatic advancements to create new knowledge in this subject area, which left the researcher to oblige with more conventional institutional prescriptions whilst leaning towards a pragmatic approach in exploring the phenomenon. To mitigate this limitation, the researcher incorporated the prescriptions and advancements of the theoretical paradigm to a maximum extent where possible.

The second limitation of this study was the practical limitations in terms of time and resources available to execute the study. The researcher is a full-time strategy consultant and therefore had to adapt the study according to and around heavy workloads and professional obligations. In terms of resources, the academic resources available on the strategy as practice paradigm were limited with regards to access to academic literature (such as new textbooks) and expertise on the more granular nuances of the paradigm. This

limitation was mitigated by relying more on published journal articles, papers in progress, conference proceedings and online contributions from the international strategy as practice community.

The third limitation of this study was the choice of appropriate methodology that would best satisfy the research objective. Upon critical assessment of the most appropriate research methodology to pursue the research objective, it was deemed that *ethnomethodology* was best suited to accomplish the research objective. However, due to its prescribed method of participant observation rather than participant communication (as is the case with other methodologies such as grounded theory), the use of ethnomethodology was rejected, and the researcher opted to use the grounded theory methodology instead. This allowed the researcher to gather empirical data by employing intensive interviewing and collecting participants' retrospective interpretation of the topic studied.

The fourth limitation of this study was access to a variety of appropriate respondents in strategy consulting firms. In using the grounded theory methodology, theoretical sampling suggests that cases that occur over several different contexts should be pursued in order to provide constant comparison between cases and contexts. However, due to the practical limitations set out above and the associated trade-off between access to data and quality of data as mentioned later in this thesis, the researcher had to settle for a smaller variety of strategy consultants willing to participate in the study. However, the issue of access was mitigated by having more intense, in-depth interviews that yielded robust data of depth, as opposed to breadth.

The fifth limitation of this study was the actual context in which the study was executed. The strategy as practice literature is almost exclusively focused on strategy in developed settings such as North America, Europe and Australia. Only a few studies were found where the strategy as practice paradigm has been applied in a developing country context, of which most were not pertaining to external strategy practitioners such as the strategy consultant and its influence on strategy. Therefore, the researcher had to be very openminded about the possible assumptions, predispositions and beliefs that could influence the study from a dual perspective: both from the established literature applied to developing theory rooted in the local empirical context through the use of grounded theory strategies as well as the

influence of the researcher's own local values, beliefs and assumptions about the literature available and its relevance to the strategy as practice domain in a local context.

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APPENDIX A
- Informed Consent Form -



Informed consent for participation in an academic research study
Department of Business Management
Exploring the relationship between strategy consultants and strategy tools using grounded theory:
A strategy-as-practice perspective

Research conducted by:
Mr. P.P. Mc Lachlan (25241835)

Dear Participant

You are invited to participate in an academic research study conducted by Philip Mc Lachlan, a Doctoral student from the Department of Business Management at the University of Pretoria.

The purpose of the study is to explore the use of strategy tools by strategy consultants during a strategic engagement with a client.

Please note the following:

- This study involves an in-depth interview. The answers you give will be treated as strictly confidential and your name will not appear anywhere in any publication.
- You will have the opportunity to confirm that the transcript derived from your interview is an accurate representation of your answer(s).
- Special care will be taken with the analysis of your answers to not divulge any proprietary information pertaining to your or your client's intellectual property, or any information that might directly identify your client.
- Your participation in this study is very important to us. You may, however, choose not to participate and you may also stop participating at any time without any negative consequences.
- Please answer the questions in the interview as completely and honestly as possible. Depending on the answers you give, the researcher might probe for elaboration at a subsequent stage.
- The results of the study will be used for academic purposes only and may be published in an academic journal. We will provide you with a summary of our findings on request.
- Please contact my study leader, Dr R. Maritz at Rachel.maritz@up.ac.za if you have any questions or comments regarding the study.

In research of this nature the study leader may wish to contact respondents to verify the authenticity of data gathered by the researcher. It is understood that any personal contact details that you may provide will be used only for this purpose, and will not compromise your anonymity or the confidentiality of your participation.

Please sign the form to indicate that:

- You have read and understand the information provided above.
- You give your consent to participate in the study on a voluntary basis.

Participant's signature

Date

APPENDIX B
- Interview Schedule -

Interview Schedule

Instructions to the participant:

- i. Kindly answer the questions below as complete and honest as possible.
- ii. Please provide as much detail as possible.
- iii. Please assume that the interviewer has no knowledge about the topic.

Please think of the last time you have used (a) strategy tool(s) when consulting to a client, irrespective of the position you were in. If you have used more than one strategy tool, select the one that you've used mostly throughout this engagement and are most comfortable with. Answer the following questions with this client engagement and strategy tool in mind.

Hint to participant: Please focus on the exact things that you have done by yourself, or in your team, or with/for your firm and the client/stakeholders. Focus on your daily doings/tasks and processes.

- Q1. Describe in your own opinion, what it is that a strategy consultant does? (Think about the daily activities and *doings* of a strategy consultant).

Capture answer here

- Q2. Think about the last strategy tool that you have used. How did you know how to use this strategy tool? How do you know how to use strategy tools in your daily work as strategy consultant?

Capture answer here

- Q3. Describe in as much detail as possible, how you (or your team/firm) went about in choosing this specific strategy tool that you have used during this engagement.

Capture answer here

- Q4. Strategy tools guide us in collecting specific information. Explain in as much detail as possible, the *process(es) of gathering information* through following the framework or process provided by this strategy tool.

Capture answer here

- Q5. Describe as comprehensively as possible, what the use of this strategy tool enabled you to **do** and **achieve** in your work as strategy consultant. Think specifically of the interaction with your team (if applicable) and all stakeholders you have dealt with, in addition to the mere outputs and strategic outcomes that you have achieved.

Capture answer here

Q6. What are some of the most important characteristics that a strategy consultant should have?

Capture answer here

Remember to thank the participant again for their time and participation in this research study!

NOTES

APPENDIX C
- Ethical Clearance -



Faculty of Economic and Management Sciences

RESEARCH ETHICS COMMITTEE

1 March 2019

Dr R Maritz
Department of Business Management

Dear Professor Maritz

The application for ethical clearance for the research project described below served before this committee on 28 February 2019 (ad hoc):

Protocol No:	EMS170/19
Principal researcher:	PP McLachlan
Research title:	Exploring the relationship between strategy consultants and strategy tools using grounded theory: a strategy-as-practice perspective
Student/Staff No:	25241835
Degree:	PhD (Business Management)
Supervisor/Promoter:	Dr R Maritz
Department:	Business Management

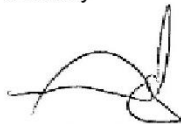
The decision by the committee is reflected below:

Decision:	Approved
Conditions (if applicable):	
Period of approval:	February 2019 – May 2019

The approval is subject to the researcher abiding by the principles and parameters set out in the application and research proposal in the actual execution of the research. The approval does not imply that the researcher is relieved of any accountability in terms of the Codes of Research Ethics of the University of Pretoria if action is taken beyond the approved proposal. If during the course of the research it becomes apparent that the nature and/or extent of the research deviates significantly from the original proposal, a new application for ethics clearance must be submitted for review.

We wish you success with the project.

Sincerely



pp PROF JA NEL
CHAIR: COMMITTEE FOR RESEARCH ETHICS

Cc: Prof AJ Antonites
Student Administration

APPENDIX D
- A synthesis of strategy as practice 2008 - 2018 -

Year	Authors	Title	Classification
2018	Wenzel & Koch	Strategy as staged performance: A critical discursive perspective on keynote speeches as a genre of strategic communication	<ul style="list-style-type: none"> Discursive aspects of strategy
2018	Koch, Wenzel, Senf, Maibier	Organizational creativity as an attributional process: The case of haute cuisine	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2018	Wenzel & Koch	From entity to process: Toward more process-based theorizing in the field of organizational change	<ul style="list-style-type: none"> Methodological reflections
2018	Iasbech & Lavarda	Strategy and Practices: A Qualitative Study of a Brazilian Public Healthcare System of Telemedicine	<ul style="list-style-type: none"> Strategizing in different contexts
2018	Balogun, Fahy & Vaara	The Interplay between HQ Legitimation and Subsidiary Legitimacy Judgments in HQ Relocation: A Social Psychological Approach	<ul style="list-style-type: none"> Discursive aspects of strategy
2018	Seidl & Werle	Inter-organizational sensemaking in the face of strategic meta-problems: Requisite variety and the dynamics of participation	<ul style="list-style-type: none"> Issues of power Strategizing in different contexts The role of formal practices The role of sensemaking
2018	Elbasha & Avetisyan	A framework to study strategizing activities at the field level: The example of CSR rating agencies	<ul style="list-style-type: none"> Definition of the s-as-p agenda and/or frameworks
2018	Knight, Paroutis & Heracleous	The power of PowerPoint: A visual perspective on meaning making in strategy	<ul style="list-style-type: none"> Tools/Techniques
2018	Löwstedt, Räisänen & Leiringer	Doing strategy in project-based organizations: Actors and patterns of action	<ul style="list-style-type: none"> Practitioners work Strategizing in different contexts The role/identity of the participants to the strategizing process
2018	Kryger	Iterative prototyping of strategy implementation workshop design	<ul style="list-style-type: none"> Practitioners work Tools/Techniques
2018	Sorsa, Merkkiniemi, Endrissat & Islam	Little less conversation, little more action: Musical intervention as aesthetic material communication	<ul style="list-style-type: none"> Practitioners work
2018	Seidl & Werle	Inter-organizational sensemaking in the face of strategic meta-problems: Requisite variety and the dynamics of participation	<ul style="list-style-type: none"> Strategizing in different contexts The role of formal practices The role of sensemaking
2018	Prange & Heracleous	Agility.X: How Organizations Thrive in Unpredictable Times	<ul style="list-style-type: none"> Others
2018	Kryger	Aligning Future Employee Action and Corporate Strategy in a Resource-scarce Environment.	<ul style="list-style-type: none"> Practitioners work Exploration of different theoretical perspectives Methodological reflections The role of sensemaking Tools/Techniques
2017	Friesl & Silberzahn	Managerial Coordination Challenges in the Alignment of Capabilities and New Subsidiary Charters in MNEs.	<ul style="list-style-type: none"> Strategizing in different contexts
2017	Jarzabkowski & Bednarek	Toward a social practice theory of relational competing	<ul style="list-style-type: none"> Strategizing in different contexts

Year	Authors	Title	Classification
2017	Kryger	Strategy development through interview technique from narrative therapy	<ul style="list-style-type: none"> Tools/Techniques
2017	Elbasha & Wright	Reconciling structure and agency in strategy-as-practice research: Towards a strong structuration theory approach.	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice Exploration of different theoretical perspectives
2017	Brandt, Lavarda, Pereiro & Lozano	Strategy as Social Practice in the Construction of a Gender Perspective for Public Policy in Florianopolis (SC) - Brazil	<ul style="list-style-type: none"> Practitioners work Strategizing in different contexts
2017	Neto & Lavarda	The Language Studies in Strategy as Practice and the Middle Manager Roles: An Essay.	<ul style="list-style-type: none"> Practitioners work
2017	Holstein, Wright & Starkey	Strategy and narrative in Higher Education	<ul style="list-style-type: none"> Discursive aspects of strategy
2017	Gond, Cabantous & Krikorian	How do things become strategic? 'Strategifying' corporate social responsibility	<ul style="list-style-type: none"> Relation to other sub-fields of strategy Strategizing in different contexts The role of formal practices The role of materiality Tools/Techniques
2017	Hautz, Seidl & Whittington	pen Strategy: Dimensions, Dilemmas, Dynamics	<ul style="list-style-type: none"> The role of formal practices Others
2016	Vaara, Sonenshein & David	Narratives as sources of stability and change in organizations: approaches and directions for future research	<ul style="list-style-type: none"> Discursive aspects of strategy
2016	Bourgoin & Muniesa	Building a Rock-Solid Slide Management Consulting, PowerPoint, and the Craft of Signification	<ul style="list-style-type: none"> Tools/Techniques
2016	Moisander, Hirsto & Fahy	Emotions in institutional work: a discursive perspective	<ul style="list-style-type: none"> Others
2016	Spee, Jarzabkowski & Smets	The Influence of Routine Interdependence and Skilful Accomplishment on the Coordination of Standardizing and Customizing	<ul style="list-style-type: none"> Others
2016	Jarzabkowski, Kaplan, Seidl & Whittington	If you aren't talking about practices, don't call it a practice-based view.	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice
2016	Jarzabkowski, Kaplan, Seidl & Whittington	On the Risk of Studying Practices in Isolation: Linking What, Who and How in Strategy Research	<ul style="list-style-type: none"> Others
2016	Bednarek, Burke, Jarzabkowski & Smets	Dynamic Client Portfolios as Sources of Ambidexterity: Exploration and Exploitation Within and Across Client Relationships	<ul style="list-style-type: none"> Others
2016	Spee & Jarzabkowski	Agreeing on what? Creating joint accounts of strategic change	<ul style="list-style-type: none"> Others
2016	Darbi & Knott	Strategising practices in an informal economy setting: A case of strategic networking	<ul style="list-style-type: none"> Strategizing in different contexts
2016	George & Desmidt	Strategic-Decision Quality in Public Organizations: An Information Processing Perspective	<ul style="list-style-type: none"> Strategizing in different contexts
2016	Marin, Cordier & Hameed	Reconciling ambiguity with interaction: implementing formal knowledge strategies in a knowledge-intensive organization	<ul style="list-style-type: none"> Strategizing in different contexts The role of sensemaking

Year	Authors	Title	Classification
			<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2016	Friesl & Kwon	The strategic importance of top management resistance: Extending Alfred D. Chandler	<ul style="list-style-type: none"> Others
2016	Ma & Seidl	New CEOs and their collaborators: Divergence and convergence between the strategic leadership constellation and the top management team	<ul style="list-style-type: none"> Issues of power The role/identity of the participants to the strategizing process
2016	Bucher & Langley	The Interplay of Reflective and Experimental Spaces in Interrupting and Reorienting Routine Dynamics	<ul style="list-style-type: none"> Practitioners work
2016	Bucher, Chreim, Langley & Reay	Contestation about Collaboration: Discursive Boundary Work among Professions.	<ul style="list-style-type: none"> Discursive aspects of strategy
2016	Cloutier	How I Write An Inquiry Into the Writing Practices of Academics	<ul style="list-style-type: none"> Others
2016	Cloutier, Denis, Langley & Lamothe	Agency at the Managerial Interface: Public Sector Reform as Institutional Work	<ul style="list-style-type: none"> Practitioners work
2016	Gylfe, Franck, Lebaron, Mantere	Video Methods in Strategy Research: Focusing on Embodied Cognition.	<ul style="list-style-type: none"> Methodological reflections
2016	Kisfalvi, Sergi & Langley	Managing and Mobilizing Microdynamics to Achieve Behavioral Integration in Top Management Teams	<ul style="list-style-type: none"> Discursive aspects of strategy
2016	Labelle & Rouleau	The institutional work of hospital risk managers: democratizing and professionalizing risk management	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2016	Mailhot, Gagnon, Langley & Binette	Distributing leadership across people and objects in a collaborative research project	<ul style="list-style-type: none"> The role of materiality
2016	George, Desmidt & De Moyer	Strategic-Decision Quality in Flemish Municipalities: The Importance of Formal and Participatory Strategic Planning	<ul style="list-style-type: none"> The role of formal practices
2016	George, Desmidt, Nielsen & Baekgaard	Rational planning and politicians' preferences for spending and reform: replication and extension of a survey experiment.	<ul style="list-style-type: none"> Strategizing in different contexts
2016	Koch, Krämer, Reckwitz & Wenzel	Zum Umgang mit Zukunft in Organisationen – eine praxistheoretische Perspektive	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2016	Breunig, Aas & Hyde	Open innovation or innovation in the open? An exploration of the strategy-innovation link in five scale- intensive service firms	<ul style="list-style-type: none"> Strategizing in different contexts
2016	Paroutis, Heracleous & Angwin	Practicing Strategy: Text and Cases	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice Introduction to Strategy as Practice Practitioners work Definition of the s-as-p agenda and/or frameworks Discursive aspects of strategy Exploration of different theoretical perspectives Issues of power Methodological reflections

Year	Authors	Title	Classification
			<ul style="list-style-type: none"> • Relation to other sub-fields of strategy • Strategizing in different contexts • The role of formal practices • The role of materiality • The role of sensemaking • The role/identity of the participants to the strategizing process • Tools/Techniques
2016	Laine & Parkkari	Implications of the Strategic Agency of Sociomaterial Configurations for Participation in Strategy-making	<ul style="list-style-type: none"> • The role of materiality
2016	Davis, van Rensburg & Venter	The impact of managerialism on the strategy work of university middle managers	<ul style="list-style-type: none"> • Practitioners work
2015	Hydle	Temporal and spatial dimensions of strategizing	<ul style="list-style-type: none"> • Strategizing in different contexts
2015	Lê & Jarzabkowski	The Role of Task and Process Conflict in Strategizing	<ul style="list-style-type: none"> • Strategizing in different contexts
2015	Desmidt & George	o We See Eye to Eye? The Relationship Between Internal Communication and Between-Group Strategic Consensus: A Case Analysis.	<ul style="list-style-type: none"> • The role/identity of the participants to the strategizing process
2015	Jarzabkowski & Kaplan	Strategy tools-in-use: A framework for understanding “technologies of rationality” in practice	<ul style="list-style-type: none"> • Tools/Techniques
2015	Jarzabkowski, Burke & Spee	Constructing Spaces for Strategic Work: A Multimodal Perspective	<ul style="list-style-type: none"> • The role of materiality
2015	Smets, Jarzabkowski, Burke & Spee	Reinsurance Trading in Lloyd’s of London: Balancing Conflicting-yet-Complementary Logics in Practice	<ul style="list-style-type: none"> • Strategizing in different contexts
2015	Jarzabkowski, Bednarek & Cabantous	Conducting global team-based ethnography: Methodological challenges and practical methods	<ul style="list-style-type: none"> • Methodological reflections
2015	Paroutis, Franco & Papadopoulos	Visual Interactions with Strategy Tools: Producing Strategic Knowledge in Workshops	<ul style="list-style-type: none"> • Practitioners work • Discursive aspects of strategy • Methodological reflections • Relation to other sub-fields of strategy • The role of materiality • The role of sensemaking • The role/identity of the participants to the strategizing process • Tools/Techniques
2015	Balogun, Best & Lê	Selling the Object of Strategy: How Frontline Workers Realize Strategy through their Daily Work	<ul style="list-style-type: none"> • Strategizing in different contexts • The role of materiality
2015	Demir	Strategic Activity as Bundled Affordance	<ul style="list-style-type: none"> • The role of materiality
2015	Jarzabkowski & Lê	We have to do this and that? You must be joking: Constructing and responding to paradox through humor	<ul style="list-style-type: none"> • Others
2015	Dameron, Lê & LeBaron	Materializing strategy, strategizing materials.	<ul style="list-style-type: none"> • The role of materiality • Tools/Techniques

Year	Authors	Title	Classification
2015	Schmactel	Local partnerships as rationalized myths. A critical examination of the micro-discourse in educational partnership working	<ul style="list-style-type: none"> • Discursive aspects of strategy • Exploration of different theoretical perspectives • Issues of power • Strategizing in different contexts • The role of sensemaking • The role/identity of the participants to the strategizing process
2015	Ma, Seidl & Guérard	The new CEO and the post-succession process: An integration of past research and future directions	<ul style="list-style-type: none"> • Strategizing in different contexts • The role/identity of the participants to the strategizing process
2015	Demir & Lychnell	Mangling the process: A meta-theoretical account of process theorizing	<ul style="list-style-type: none"> • Methodological reflections
2015	Laine, Meriläinen, Tienari & Vaara	Mastery, submission, and subversion: On the performative construction of strategist identity	<ul style="list-style-type: none"> • The role/identity of the participants to the strategizing process
2015	Laamanen, Lamberg & Vaara	Explanations Of Success And Failure In Management Learning: What Can We Learn From Nokia's Rise And Fall?	<ul style="list-style-type: none"> • Discursive aspects of strategy
2015	Cornelissen, Durand, Lammers & Vaara	Putting Communication Front and Center in Institutional Theory and Analysis	<ul style="list-style-type: none"> • Discursive aspects of strategy
2015	Ghadiri, Gond & Brés	entity work of corporate social responsibility consultants: Managing discursively the tensions between profit and social responsibility	<ul style="list-style-type: none"> • The role/identity of the participants to the strategizing process
2015	Fachin & Davel	Reconciling contradictory paths: identity play and work in a career transition	<ul style="list-style-type: none"> • The role/identity of the participants to the strategizing process
2015	Vaara & Lamberg	Taking historical embeddedness seriously: Three approaches to advance strategy process and practice research	<ul style="list-style-type: none"> • Definition of the s-as-p agenda and/or frameworks
2015	Kroon, Cornelissen & Vaara	Explaining employees' reactions towards a cross-border merger: The role of English language fluency.	<ul style="list-style-type: none"> • Discursive aspects of strategy
2015	Laine, Meriläinen, Tienari, Vaara	Mastery, submission, and subversion: On the performative construction of strategist identity	<ul style="list-style-type: none"> • The role/identity of the participants to the strategizing process
2015	Joutsenvirta & Vaara	Legitimacy struggles and political corporate social responsibility in international settings: A comparative discursive analysis of a contested investment in Latin America	<ul style="list-style-type: none"> • Discursive aspects of strategy
2015	Cloutier & Langley	Negotiating the Moral Aspects of Purpose in Single and Cross-Sectoral Collaboration	<ul style="list-style-type: none"> • The role of sensemaking
2015	Balogun, Bartunek & Do	Senior managers' sensemaking and responses to strategic change	<ul style="list-style-type: none"> • The role of sensemaking
2015	Werle & Seidl	The layered materiality of strategizing: epistemic objects and the interplay between material artefacts in the exploration of strategic topics	<ul style="list-style-type: none"> • The role of materiality • The role of sensemaking
2015	Laine & Parkkari	Dynamics of strategic agency and participation in strategy-making – the	<ul style="list-style-type: none"> • The role of materiality

Year	Authors	Title	Classification
		entanglement of human actions, IT, and other materialities	
2015	Oliver	Identity work as a strategic practice	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives • The role/identity of the participants to the strategizing process
2015	Garud, Simpson, Langley & Tsoukas	The Emergence of Novelty in Organizations. Perspectives on Process Organization Studies	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2015	Jarzabkowski, Bednarek & Spee	Making a Market for Acts of God: The Practice of Risk Trading in the Global Reinsurance Industry	<ul style="list-style-type: none"> • Strategizing in different contexts
2015	Löwstedt	Strategizing in Construction: Exploring practices and paradoxes	<ul style="list-style-type: none"> • Strategizing in different contexts
2015	Seidl & Guerard	Meetings and workshops in the practice of strategy	<ul style="list-style-type: none"> • The role of formal practices
2015	Splitter & Seidl	Practical relevance of practice-based research on strategy	<ul style="list-style-type: none"> • Critical reflections on strategy-as-practice
2014	Abdallah & Langley	The Double Edge of Ambiguity in Strategic Planning	<ul style="list-style-type: none"> • Discursive aspects of strategy
2014	Edwards & Molz	MNE practice transfer as a process of institutional change	<ul style="list-style-type: none"> • Strategizing in different contexts
2014	Herepath	In the Loop: A Realist Approach to Structure and Agency in the Practice of Strategy.	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives • Methodological reflections
2014	Crilly & Sloan	Autonomy or control?: Organizational architecture and attention to stakeholders	<ul style="list-style-type: none"> • The role of sensemaking
2014	Balogun, Jacobs, Jarzabkowski, Mantere & Vaara	Placing Strategy Discourse in Context: Sociomateriality, Sensemaking, and Power.	<ul style="list-style-type: none"> • Definition of the s-as-p agenda and/or frameworks
2014	Menz & Scheef	Chief Strategy Officers: Contingency Analysis of Their Presence in Top Management Teams.	<ul style="list-style-type: none"> • Relation to other sub-fields of strategy
2014	Seidl & Whittington	Enlarging the Strategy-as-Practice Research Agenda: Towards Taller and Flatter Ontologies	<ul style="list-style-type: none"> • Critical reflections on strategy-as-practice • Definition of the s-as-p agenda and/or frameworks
2014	Florice, Bonneau, Aubry & Sergi	Extending project management research: Insights from social theories	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2014	Harbour & Kisfalvi	An Exploration of Managerial Courage.	<ul style="list-style-type: none"> • The role of sensemaking
2014	Klag & Langley	Critical junctures in strategic planning: Understanding failure to enable success	<ul style="list-style-type: none"> • The role of formal practices
2014	Lindgren, Packendorff & Sergi	Thrilled by the discourse, suffering through the experience: Emotions in project-based work	<ul style="list-style-type: none"> • Discursive aspects of strategy
2014	Michaud	Mediating the Paradoxes of Organizational Governance Through Numbers.	<ul style="list-style-type: none"> • Strategizing in different contexts
2014	Rouleau, de Rond & Musca	From the ethnographic turn to new forms of organizational ethnography	<ul style="list-style-type: none"> • Methodological reflections
2014	Sorsa, Pälli & Mikkola	Appropriating the words of strategy in performance appraisal interviews	<ul style="list-style-type: none"> • Discursive aspects of strategy

Year	Authors	Title	Classification
2014	Jarzabkowski, Bednaerk & Lê	Producing persuasive findings: Demystifying ethnographic textwork in strategy and organization research	<ul style="list-style-type: none"> Methodological reflections
2014	Jarzabkowski & Pinch	Sociomateriality is 'the New Black': Accomplishing repurposing, reinscripting and repairing in context	<ul style="list-style-type: none"> The role of materiality
2014	Smets, Burke, Jarzabkowski & Spee	Charting new territory for organizational ethnography: Insights from a team-based video ethnography	<ul style="list-style-type: none"> Methodological reflections
2014	Dameron & Torset	The discursive construction of strategists' subjectivities: towards a paradox lens on strategy.	<ul style="list-style-type: none"> Discursive aspects of strategy The role/identity of the participants to the strategizing process
2014	Fahy, Esterby-Smith & Lervik	The power of spatial and temporal orderings in organizational learning.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2014	Healey, Hodgkinson, Whittington & Johnson	Off to Plan or Out to Lunch? Relationships between Design Characteristics and Outcomes of Strategy Workshops.	<ul style="list-style-type: none"> The role of formal practices Tools/Techniques
2014	Vesa & Vaara	Strategic ethnography 2.0: Four methods for advancing strategy process and practice research	<ul style="list-style-type: none"> Methodological reflections
2014	Kozica, Kaiser & Friesl	Organizational Routines: Conventions as a source of change and stability.	<ul style="list-style-type: none"> Others
2014	Balogun, Jacobs, Jarzabkowski, Mantere & Vaara	Placing strategy discourse in context: Sociomateriality, sensemaking, and power.	<ul style="list-style-type: none"> Issues of power The role of sensemaking
2014	Corenlissen, Mantere & Vaara	The contraction of meaning: the combined effect of communication, emotions, and materiality on sensemaking in the Stockwell shooting.	<ul style="list-style-type: none"> The role of materiality
2014	Vaara	Struggles over legitimacy in the Eurozone crisis: Discursive legitimation strategies and their ideological underpinnings.	<ul style="list-style-type: none"> Discursive aspects of strategy
2014	Vaara & Pedersen	Strategy and chronotopes: A Bakhtinian perspective on the construction of strategy narratives.	<ul style="list-style-type: none"> Discursive aspects of strategy Issues of power The role/identity of the participants to the strategizing process
2014	Sugarman	Dynamic Capability Seen Through a Duality-Paradox Lens: A Case of Radical Innovation at Microsoft.	<ul style="list-style-type: none"> Discursive aspects of strategy Exploration of different theoretical perspectives
2014	Peltokorpi & Vaara	Knowledge transfer in multinational corporations: Productive and counterproductive effects of language-sensitive recruitment.	<ul style="list-style-type: none"> Others
2014	Vaara, Sarala, Ehrnrooth & Koveshnikov	Attributional tendencies in cultural explanations of M&A performance.	<ul style="list-style-type: none"> Others
2014	Baeta, Brito & Souza	Strategy as Discursive Practice in a Brazilian Public University: A Look under the Perspective of Critical Discourse Analysis.	<ul style="list-style-type: none"> Discursive aspects of strategy
2014	Hydle, Aas & Breunig	Strategies for financial service innovation: Innovation becomes strategy-making.	<ul style="list-style-type: none"> Strategizing in different contexts

Year	Authors	Title	Classification
2014	Cooren, Vaara, Langley & Tsoukas	Language and Communication @ Work: Discourse, Narrativity and Organizing.	<ul style="list-style-type: none"> Discursive aspects of strategy
2014	George & Desmidt	A State of Research on Strategic Management in the Public Sector: An Analysis of the Empirical Evidence.	<ul style="list-style-type: none"> Strategizing in different contexts
2014	Kolsteeg	Shifting Gear, the daily deliberation between arts and economics in cultural and creative organizations, Utrecht 2010-2012.	<ul style="list-style-type: none"> Practitioners work
2014	Cooren, Vaara, Langley & Tsoukas	Language and Communication at Work: Discourse, Narrativity, and Organizing.	<ul style="list-style-type: none"> Discursive aspects of strategy
2014	Liu & Maitlis	Emotional Dynamics and Strategizing Processes: A Study of Strategic Conversations in Top Team Meetings.	<ul style="list-style-type: none"> Discursive aspects of strategy
2014	Mueller, Whittle, Gilchrist & Lenney	Politics and strategy practice: An ethnomethodologically-informed discourse analysis perspective.	<ul style="list-style-type: none"> Discursive aspects of strategy Issues of power Methodological reflections
2014	Salih & Doll	A middle management perspective on strategy implementation.	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2013	Vesa & Franck	Bringing strategy to time, studying strategy as experiential vectors.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives Relation to other sub-fields of strategy
2013	Suddaby, Seidl & Lane	Strategy-as-Practice meets Neo-Institutional Theory.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2013	Jarzabkowski, Lê & Van de Ven	Responding to competing strategic demands: How organizing, belonging, and performing paradoxes coevolve.	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2013	Jarzabkowski, Spee & Smets	Material artifacts: Practices for doing strategy with 'stuff'.	<ul style="list-style-type: none"> Tools/Techniques
2013	Paroutis & Heracleous	Discourse Revisited: Dimensions and Employment of First-Order Strategy Discourse during Institutional Adoption.	<ul style="list-style-type: none"> Discursive aspects of strategy Exploration of different theoretical perspectives Relation to other sub-fields of strategy The role/identity of the participants to the strategizing process
2013	Paroutis, Mckeown & Collinson	Building castles from sand: Unlocking CEO mythopoetical behaviour in Hewlett Packard from 1978 to 2005	<ul style="list-style-type: none"> Discursive aspects of strategy The role/identity of the participants to the strategizing process
2013	Menz, Müller-Stewens, Zimmermann & Lattwein	The Chief Strategy Officer in the European Firm: Professionalising Strategy in Times of Uncertainty.	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2013	Carter	The Age of Strategy: Strategy, Organizations and Society.	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice Exploration of different theoretical perspectives
2013	Brown & Thompson	A narrative approach to strategy-as-practice.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives Methodological reflections

Year	Authors	Title	Classification
2013	Teulier & Rouleau	Middle Managers' Sensemaking and Interorganizational Change Initiation: Translation Spaces and Editing Practices.	<ul style="list-style-type: none"> Practitioners work
2013	Vasquez, Sergi & Cordelier	From being branded to doing branding: Studying representation practices from a communication-centered approach.	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2013	Vasquez & Cooren	Spacing Practices: The Communicative Configuration of Organizing Through Space-Time.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2013	Rouleau	Organizational ethnography from yesterday to tomorrow.	<ul style="list-style-type: none"> Methodological reflections
2013	Vieira, Correia & Lavarda	Informal Strategizing in a Public Organization	<ul style="list-style-type: none"> Strategizing in different contexts
2013	Guérard, Bode & Gustafsson	Turning Point Mechanisms in a Dualistic Process Model of Institutional Emergence: The Case of the Diesel Particulate Filter in Germany	<ul style="list-style-type: none"> Discursive aspects of strategy
2013	Jarzabkowski, Giuletti, Oliveira & Amoo	"We don't need no education". Or do we: Management education and alumni adoption of strategy tool	<ul style="list-style-type: none"> Tools/Techniques
2013	Cloutier & Langley	The Logic of Institutional Logics. Insights from French Pragmatist Sociology	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2013	Harbour & Kisfalvi	In the Eye of the Beholder: An Exploration of Managerial Courage	<ul style="list-style-type: none"> Practitioners work
2013	Jacobs, Oliver & Heracleous	Diagnosing Organizational Identity Beliefs by Eliciting Complex, Multimodal Metaphors	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2013	Langley, Tsoukas & Van de Ven	Process Studies of Change in Organization and Management: Unveiling Temporality, Activity, and Flow	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2013	Sloan & Oliver	Building Trust in Multi-stakeholder Partnerships: Critical Emotional Incidents and Practices of Engagement	<ul style="list-style-type: none"> Strategizing in different contexts
2013	Rouleau	Strategy-as-practice research at a crossroads	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice
2013	Jarzabkowski, Spee & Smets	Material artefacts: Practices for doing strategy with 'stuff'	<ul style="list-style-type: none"> Tools/Techniques
2013	Guérard, Langley & Seidl	Rethinking the concept of performance in strategy research: Towards a performativity perspective	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2013	Chreim, Langley, Comeau-Vallée, Huq & Reay	Leadership as boundary work in healthcare teams.	<ul style="list-style-type: none"> Practitioners work
2013	Colin, Grasser & Oiry	HR devices in the making of sense of a strategic decision. The case of a housing management company.	<ul style="list-style-type: none"> Practitioners work
2013	Heinzmann, Lavarda, Machado & Hein	Manufacture strategy stages and strategy-as-practice phases.	<ul style="list-style-type: none"> Relation to other sub-fields of strategy The role of formal practices
2013	Friessl & Larty	Replication of Routines in Organizations: Existing Literature and New Perspectives.	<ul style="list-style-type: none"> Others
2013	Monin, Noorderhaven, Vaara & Kroon	Giving sense to and making sense of norms of justice in post-merger integration.	<ul style="list-style-type: none"> The role of sensemaking Others
2013	Mantere, Aula, Schildt & Vaara	Narrative attributions of entrepreneurial failure.	<ul style="list-style-type: none"> Discursive aspects of strategy

Year	Authors	Title	Classification
			<ul style="list-style-type: none"> Others
2013	Vesa & Franck	Bringing strategy to time, Studying Strategy as Experiential Vectors	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2013	Hensmans, Johnson & Yip	Strategic transformation: Changing while winning.	<ul style="list-style-type: none"> Others
2013	Carlile, Nicolini, Langley & Tsoukas	How Matter Matters: Objects, Artefacts and Materiality in Organizations.	<ul style="list-style-type: none"> The role of materiality
2013	Sage, Dainty & Brookes	A 'strategy-as-practice' exploration of lean construction strategizing	<ul style="list-style-type: none"> Issues of power The role of formal practices
2013	Menz	Functional Top Management Team Members: A Review, Synthesis, and Research Agenda	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2012	Kuepers, Mantere & Statler	Strategy as Storytelling: A phenomenological collaboration	<ul style="list-style-type: none"> Others
2012	Pretorius & Stander	The identification of management consultant liabilities during strategising	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2012	Sillince, Jarzabkowski & Shaw	Shaping strategic action through the rhetorical construction and exploitation of ambiguity.	<ul style="list-style-type: none"> Discursive aspects of strategy
2012	Jarzabkowski, Lê & Feldman	Toward a Theory of Coordinating: Creating Coordinating Mechanisms in Practice	<ul style="list-style-type: none"> Tools/Techniques
2012	Degravel	Strategy as Practice to reconcile small businesses' strategies and RBV?	<ul style="list-style-type: none"> Definition of the s-as-p agenda and/or frameworks Methodological reflections Strategizing in different contexts
2012	Wright, Paroutis & Blettner	How Useful Are the Strategic Tools We Teach in Business Schools?	<ul style="list-style-type: none"> Methodological reflections Tools/Techniques
2012	Sergi, Denis & Langley	Opening Up Perspectives on Plural Leadership	<ul style="list-style-type: none"> Others
2012	Langley, Golden-Biddle, Reay, Denis, Hébert, Lamothe & Gervais	Identity Struggles in Merging Organizations Renegotiating the Sameness–Difference Dialectic.	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2012	Harbour & Kisfalvi	Looking desperately for courage or how to study a polysemic concept.	<ul style="list-style-type: none"> Methodological reflections
2012	Bizzi & Langley	Studying processes in and around networks	<ul style="list-style-type: none"> Methodological reflections
2012	Cornut, Giroux & Langley	The strategic plan as a genre.	<ul style="list-style-type: none"> Discursive aspects of strategy
2012	Crilly & Sloan	Enterprise logic: explaining corporate attention to stakeholders from the 'inside-out'.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2012	Dansou & Langley	Institutional Work and the Notion of Test.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2012	Denis, Langley & Sergi	Leadership in the Plural	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2012	Vaara & Whittington	Strategy-as-practice: Taking social practices seriously.	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice
2012	Smets, Morris & Greenwood	From Practice to Field: A Multi-level Model of Practice-driven Institutional Change.	<ul style="list-style-type: none"> Practitioners work

Year	Authors	Title	Classification
2012	Nordqvist	Understanding strategy processes in family firms: Exploring the roles of actors and arenas	<ul style="list-style-type: none"> Strategizing in different contexts The role/identity of the participants to the strategizing process
2012	Aggerholm, Asmuß & Thomsen	The role of recontextualization for the multivocal, ambiguous process of strategizing.	<ul style="list-style-type: none"> Discursive aspects of strategy The role/identity of the participants to the strategizing process
2012	Vasquez, Brummans & Groleau	Notes from the field on organizational shadowing as framing.	<ul style="list-style-type: none"> Methodological reflections
2012	Verwey & Davis	Network Direct Selling Organisations: a schismatic perspective.	<ul style="list-style-type: none"> Discursive aspects of strategy Exploration of different theoretical perspectives
2012	Davis	A second-order explanation for network direct selling organisations as self-creating systems.	<ul style="list-style-type: none"> Discursive aspects of strategy Exploration of different theoretical perspectives Issues of power
2012	Demir	Translation of relational practices in an MNC subsidiary: Symmetrical, asymmetrical and substitutive strategies	<ul style="list-style-type: none"> Others
2012	Vaara & Durand	How to make strategy research connect with broader issues that matter?	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice Definition of the s-as-p agenda and/or frameworks Methodological reflections
2012	Küpers, Mantere & Statler	Strategy as Storytelling: A Phenomenological Collaboration.	<ul style="list-style-type: none"> Discursive aspects of strategy
2012	Mantere, Schildt & Sillince	Reversal of Strategic Change	<ul style="list-style-type: none"> The role of sensemaking
2012	Sugarman	Organizational learning – dynamic, integrative: A concept returns, older and wiser	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2012	Jormanainen & Koveshnikov	International activities of emerging market firms: A critical assessment of research in top international management journals	<ul style="list-style-type: none"> Others
2012	Koveshnikov, Barner-Rasmussen, Ehnrooth & Mäkelä	Multinational companies' corporate practices in Russia: What seems to work best	<ul style="list-style-type: none"> The role of formal practices
2012	Vuori & Virtaharju	On the Role of Emotional Arousal in Sensegiving	<ul style="list-style-type: none"> Others
2012	Nicolini	Practice Theory, Work, and Organization. An Introduction	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2012	Sorsa	Discourse and the social practice of strategy: Of interaction, texts, and power effects	<ul style="list-style-type: none"> Discursive aspects of strategy
2012	Whittington & Yakis-Douglas	Strategic Disclosure Strategy as a Form of Reputation Management.	<ul style="list-style-type: none"> Discursive aspects of strategy
2011	Splitter & Seidl	Does practice-based research on strategy lead to practically relevant knowledge? Implications of a Bourdieusian perspective	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice Methodological reflections

Year	Authors	Title	Classification
2011	Denis, Dompierre, Langley & Rouleau	Escalating indecision: Between reification and strategic ambiguity.	<ul style="list-style-type: none"> • Strategizing in different contexts
2011	Mantere, Schildt & Sillince	Reversal of Strategic Change	<ul style="list-style-type: none"> • The role of sensemaking
2011	Vaara & Tienari	On the narrative construction of multinational corporations: An ante-narrative analysis of legitimation and resistance in a cross-border merger.	<ul style="list-style-type: none"> • Discursive aspects of strategy
2011	Riad & Vaara	Varieties of metonymy in media accounts of mergers and acquisitions.	<ul style="list-style-type: none"> • Discursive aspects of strategy • Issues of power
2011	Schildt, Mantere & Vaara	Reasonability and the linguistic division of labour in institutional work	<ul style="list-style-type: none"> • Discursive aspects of strategy
2011	Balogun, Jarzabkowski & Vaara	Selling, resistance and reconciliation: A critical discursive approach to subsidiary role evolution in MNCs.	<ul style="list-style-type: none"> • Discursive aspects of strategy
2011	Kaplan	Strategy and PowerPoint: An Inquiry into the Epistemic Culture and Machinery of Strategy Making	<ul style="list-style-type: none"> • Tools/Techniques
2011	Järventie-Thesleff, Moisander & Laine	Organizational dynamics and complexities of corporate brand building—A practice perspective	<ul style="list-style-type: none"> • Relation to other sub-fields of strategy • Strategizing in different contexts
2011	Spee & Jarzabkowski	Strategic planning as communicative process	<ul style="list-style-type: none"> • Discursive aspects of strategy
2011	Regnér & Zander	Knowledge Creation in the Multinational Company: Social-Identity Frames and Inter-Subgroup Tension in Knowledge Combination.	<ul style="list-style-type: none"> • The role/identity of the participants to the strategizing process
2011	Kornberger & Clegg	Strategy as performative practice: The case of Sydney 2030	<ul style="list-style-type: none"> • Discursive aspects of strategy • Issues of power • Relation to other sub-fields of strategy • Strategizing in different contexts
2011	Whittington	The practice turn in organization research: Towards a disciplined.	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks
2011	Van Wessel, van Buuren & van Woerkum	Changing Planning by Changing Practice. How Water Managers Innovate Through Action	<ul style="list-style-type: none"> • Issues of power • The role/identity of the participants to the strategizing process
2011	Ludwig & Pemberton	A managerial perspective of dynamic capabilities in emerging markets: The case of the Russian steel industry.	<ul style="list-style-type: none"> • Strategizing in different contexts
2011	Corbett-Etchevers & Mounoud	A narrative framework for management ideas: Disclosing the plots of knowledge management in a multinational company.	<ul style="list-style-type: none"> • Discursive aspects of strategy
2011	Lavarda, Canet-Giner & Peris-Bone	Understanding how the strategy formation process interacts with the management of complex work	<ul style="list-style-type: none"> • Strategizing in different contexts • Tools/Techniques
2011	Denis, Dompierre,	Escalating Indecision: Between Reification and Strategic Ambiguity	<ul style="list-style-type: none"> • Strategizing in different contexts

Year	Authors	Title	Classification
	Langley & Rouleau		
2011	Cloutier	Nonprofit Organizations: How to Better Manage Donor Relationships?	<ul style="list-style-type: none"> Practitioners work
2011	Whittington, Yakis-Douglas & Ludovic	Opening strategy: Evolution of a precarious profession	<ul style="list-style-type: none"> Practitioners work
2011	Clarke, Kwon & Wodak	A context-sensitive approach to analysing talk in strategy meetings	<ul style="list-style-type: none"> Exploration of different theoretical perspectives The role of formal practices
2011	Gomez & Bouty	The emergence of an influential practice: Food for thought.	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2011	Abdallah, Denis & Langley	Having your cake and eating it too: Discourses of transcendence and their role in organizational change dynamics.	<ul style="list-style-type: none"> Practitioners work
2011	Fauré & Rouleau	The strategic competence of accountants and middle managers in budget making	<ul style="list-style-type: none"> Tools/Techniques
2011	Fenton & Langley	Strategy as Practice and the Narrative Turn	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2011	Boxenbaum & Rouleau	New Knowledge Products as Bricolage: Metaphors and Scripts in Organizational Theory.	<ul style="list-style-type: none"> Others
2011	Kisfalvi & Maguire	On the Nature of Institutional Entrepreneurs: Insights from the Life of Rachel Carson.	<ul style="list-style-type: none"> Practitioners work
2011	Rouleau & Balogun	Middle Managers, Strategic Sensemaking, and Discursive Competence.	<ul style="list-style-type: none"> Discursive aspects of strategy
2011	Verwey & Davis	Sociocybernetics and autopoiesis - new laws of organisational form?	<ul style="list-style-type: none"> Exploration of different theoretical perspectives Issues of power
2011	Cabantous & Gond	Rational decision-making as performative praxis: Explaining rationality éternel retour.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2011	Schildt, Mantere & Vaara	Reasonability and the Linguistic Division of Labour in Institutional Work.	<ul style="list-style-type: none"> Discursive aspects of strategy
2011	Heracleous & Jacobs	Crafting Strategy - Embodied Metaphors in Practice	<ul style="list-style-type: none"> Discursive aspects of strategy
2011	Langley & Abdallah	Templates and Turns in Qualitative Studies of Strategy and Management	<ul style="list-style-type: none"> Methodological reflections
2011	Grant & Hall	Power and Discourse in Organizational Change: The Case of Enterprise Resource Planning Systems	<ul style="list-style-type: none"> Discursive aspects of strategy
2011	Regnér	Strategy as Practice – Untangling the Emergence of Competitive Positions.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2011	Kruse	Strategic Discourse. Actors-Issues-Arenas.	<ul style="list-style-type: none"> Discursive aspects of strategy Issues of power Strategizing in different contexts The role of sensemaking The role/identity of the participants to the strategizing process

Year	Authors	Title	Classification
2011	Garcia-Rosell, Moisaner & Fahy	A multi-stakeholder perspective on creating and managing strategies for sustainable marketing and product development.	<ul style="list-style-type: none"> • Others
2011	Koveshnikov	National identity in times of organizational globalization. A case study of 2 Finnish-Russian organizations.	<ul style="list-style-type: none"> • Issues of power • The role/identity of the participants to the strategizing process
2011	Sorsa	Kun strategia tuli kaupunkiin - Kuntasektori strategiaopin areenana	<ul style="list-style-type: none"> • Discursive aspects of strategy
2011	McCabe	Strategy-as-Power: Ambiguity, Contradiction and the Exercise of Power in a UK Building Society	<ul style="list-style-type: none"> • Critical reflections on strategy-as-practice • Issues of power
2011	Antonacopoulou & Balogun	Collaborating to discover the practice of strategy and its impact.	<ul style="list-style-type: none"> • Methodological reflections
2010	Johnson, Prashantham, Floyd & Bourque	Ritualization of Strategy Workshops.	<ul style="list-style-type: none"> • The role of formal practices
2010	Lervik, Fahy & Easterby-Smith	Temporal dynamics of situated learning in organizations	<ul style="list-style-type: none"> • Others
2010	Vaara, Sorsa & Pälli	On the force potential of strategy texts: A critical discourse analysis of a strategic plan and its power effects in a city organization.	<ul style="list-style-type: none"> • Discursive aspects of strategy • Issues of power
2010	Tuckermann & Rüegg-Stürm	Researching Practice and Practicing Research Reflexively: Conceptualizing the Relationship Between Research Partners and Researchers in Longitudinal Studies	<ul style="list-style-type: none"> • Methodological reflections
2010	Diagle & Rouleau	Strategic plans in arts organizations: a compromising tool between artistic and managerial values.	<ul style="list-style-type: none"> • Others
2010	Denis, Langley & Rouleau	The practice of leadership in the messy world of organizations.	<ul style="list-style-type: none"> • Others
2010	Fauré, Brummans, Giroux & Taylor	The Calculation of Business, Or the Business of Calculation? Accounting as Organizing through Everyday Communication	<ul style="list-style-type: none"> • Others
2010	Stensaker & Langley	Change management choices and change trajectories in a multidivisional firm.	<ul style="list-style-type: none"> • Others
2010	Sugarman	Organizational Learning and Reform at New York Police Department	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives • Strategizing in different contexts
2010	McKinlay, Carter, Pezet & Clegg	Using Foucault to Make Strategy	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2010	Carter, Clegg & Kornberger	Re-framing Strategy: Power, Politics and Accounting.	<ul style="list-style-type: none"> • Critical reflections on strategy-as-practice
2010	Suominen & Mantere	Consuming Strategy: The Art and Practice of Managers' Everyday Strategy Usage	<ul style="list-style-type: none"> • Discursive aspects of strategy • The role/identity of the participants to the strategizing process
2010	Ketokivi & Mantere	Two Strategies for Inductive Reasoning in Organizational Research	<ul style="list-style-type: none"> • Methodological reflections

Year	Authors	Title	Classification
2010	Jarzabkowski, Sillince & Shaw	Strategic ambiguity as a rhetorical resource for enabling multiple strategic goals	<ul style="list-style-type: none"> Discursive aspects of strategy The role of sensemaking
2010	Vaara	Taking the linguistic turn seriously: Strategy as multifaceted and interdiscursive phenomenon.	<ul style="list-style-type: none"> Discursive aspects of strategy Methodological reflections
2010	Erkama & Vaara	Struggles over legitimacy in global organizational restructuring: A rhetorical perspective on legitimation strategies and dynamics in a shutdown case.	<ul style="list-style-type: none"> Discursive aspects of strategy
2010	Vaara & Monin	A recursive perspective on discursive legitimation and organizational action in mergers and acquisitions	<ul style="list-style-type: none"> Discursive aspects of strategy
2010	Lavarda, Canet-Giner & Peris-Bonet	How middle managers contribute to strategy formation process: connection of strategy processes and strategy practices	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2010	Jarratt & Stiles	How are Methodologies and Tools Framing Managers' Strategizing Practice in Competitive Strategy Development?	<ul style="list-style-type: none"> Tools/Techniques
2010	Elms, Brammer, Harris & Phillips	New Directions in Strategic Management and Business Ethics	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2010	Grant & Oswick	Actioning Organizational Discourse to Re-Articulate Change Practice.	<ul style="list-style-type: none"> Discursive aspects of strategy
2010	Kornberger & Carter	Manufacturing Competition: How Accounting Practices Shape Strategy Making in Cities	<ul style="list-style-type: none"> Definition of the s-as-p agenda and/or frameworks Exploration of different theoretical perspectives Issues of power Relation to other sub-fields of strategy Strategizing in different contexts
2010	Hendry, Kiel & Nicholson	How Boards Strategise: A Strategy as Practice View.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives Issues of power The role/identity of the participants to the strategizing process
2010	Blomquist, Hällgren, Nilsson & Söderholm	Project-as-practice: In search of project management research that matters.	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2010	Jørgensen & Messner	Accounting and strategising: A case study from new product development.	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2010	Cabantous, Gond & Johnson-Cramer	Decision theory as practice: Crafting rationality in organizations.	<ul style="list-style-type: none"> The role of formal practices
2010	Whittle & Mueller	Strategy, enrolment and accounting: The politics of strategic ideas	<ul style="list-style-type: none"> Issues of power Tools/Techniques
2010	Balogun, Jarzabkowski & Vaara	A struggle over voice: A critical discursive approach to strategic change in MNCs.	<ul style="list-style-type: none"> Discursive aspects of strategy
2010	Vaara, Sorsa & Pälli	On the force potential of strategy texts: A critical discourse analysis of a strategic plan and its power effects in a city organization.	<ul style="list-style-type: none"> Discursive aspects of strategy
2010	Vaara	Taking the Linguistic turn seriously: Strategy as multifaceted and interdiscursive phenomenon	<ul style="list-style-type: none"> Discursive aspects of strategy

Year	Authors	Title	Classification
2010	Samra-Fredericks	Researching everyday practice: the ethnomethodological contribution.	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Discursive aspects of strategy • Strategizing in different contexts
2010	Golsorkhi, Rouleau, Vaara & Seidl	Introduction: What is Strategy as Practice?	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Relation to other sub-fields of strategy
2010	MacIntosh, MacLean & Seidl	Unpacking the Effectivity Paradox of Strategy Workshops: Do Strategy Workshops Produce Strategic Change?	<ul style="list-style-type: none"> • Discursive aspects of strategy • The role/identity of the participants to the strategizing process
2010	Golsorkhi, Rouleau, Seidl & Vaara	Cambridge Handbook of Strategy as Practice	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Discursive aspects of strategy • Strategizing in different contexts
2010	Vaara	Critical discourse analysis as methodology in Strategy as Practice research.	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Discursive aspects of strategy • Strategizing in different contexts
2010	Orlikowski	Practice in research: phenomenon, perspective and philosophy.	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2010	Chia & Rasche	Epistemological alternatives for researching Strategy as Practice: building and dwelling worldviews.	<ul style="list-style-type: none"> • Critical reflections on strategy-as-practice • Definition of the s-as-p agenda and/or frameworks • Exploration of different theoretical perspectives • Methodological reflections
2010	Tsoukas	Practice, strategy making and intentionality: a Heideggerian onto-epistemology for Strategy as Practice	<ul style="list-style-type: none"> • Critical reflections on strategy-as-practice • Definition of the s-as-p agenda and/or frameworks • Exploration of different theoretical perspectives
2010	Grand, Rüegg-Stürm & von Arx	Constructivist epistemologies in Strategy as Practice research	<ul style="list-style-type: none"> • Critical reflections on strategy-as-practice • Exploration of different theoretical perspectives
2010	Golden-Biddle & Azuma	Constructing contribution in 'Strategy as Practice' research.	<ul style="list-style-type: none"> • Discursive aspects of strategy • Methodological reflections
2010	Langley	The challenge of developing cumulative knowledge about Strategy as Practice	<ul style="list-style-type: none"> • Critical reflections on strategy-as-practice • Methodological reflections
2010	Whittington	Giddens, structuration theory and Strategy as Practice.	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives

Year	Authors	Title	Classification
2010	Jarzabkowski	An activity-theory approach to Strategy as Practice.	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2010	Gomez	A Bourdieusian perspective on strategizing.	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2010	Mantere	A Wittgensteinian perspective on strategizing.	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2010	Allard-Poesi	A Foucauldian perspective on strategic practice: strategy as the art of (un)folding	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2010	de La Ville & Mounoud	A narrative approach to Strategy as Practice: strategy making from texts and narratives	<ul style="list-style-type: none"> • Exploration of different theoretical perspectives
2010	Huff, Neyer & Möslein	Broader methods to support new insights into strategizing.	<ul style="list-style-type: none"> • Methodological reflections
2010	Johnson, Balogun & Beech	Researching strategists and their identity in practice: building 'close-with' relationships.	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Discursive aspects of strategy • Strategizing in different contexts
2010	Rouleau	Studying strategizing through narratives of practice	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Discursive aspects of strategy • Strategizing in different contexts
2010	Johnson, Smith & Codling	Institutional change and strategic agency: an empirical analysis of managers' experimentation with routines in strategic decision-making	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Discursive aspects of strategy • Strategizing in different contexts
2010	Laine & Vaara	Struggling over subjectivity: a critical discourse analysis of strategic development	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Discursive aspects of strategy • Strategizing in different contexts
2010	Ericson & Melin	Strategizing and history.	<ul style="list-style-type: none"> • Introduction to Strategy as Practice • Definition of the s-as-p agenda and/or frameworks • Discursive aspects of strategy • Strategizing in different contexts
2010	Jarzabkowski & Kaplan	Taking strategy-as-practice across the Atlantic	<ul style="list-style-type: none"> • Introduction to Strategy as Practice
2010	Johnson, Balogun & Beech	Researching the strategist's identity in practice: building 'close-with' relationships.	<ul style="list-style-type: none"> • Methodological reflections • The role/identity of the participants to the strategizing process

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2010	Denis, Lamothe & Langley	The Dynamics of Collective Leadership and Strategic Change in Pluralistic Organizations	<ul style="list-style-type: none"> Others
2010	Piette & Rouleau	The analysis of strategic texts based on critical hermeneutics and literary narratology	<ul style="list-style-type: none"> Others
2010	Sorsa, Pälli, Vaara & Peltola	Strategia mahdollisuutena ja rajoitteena kuntaorganisaatiossa: Kielestä, kommunikaatiosta ja vallasta	<ul style="list-style-type: none"> Discursive aspects of strategy
2010	Regnér	Strategy Process Research and the RBV: Social Barriers to Imitation	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2010	Demir	Strategy as Sociomaterial Practices: Planning, Decision-Making, and Responsiveness in Corporate Lending	<ul style="list-style-type: none"> The role of materiality
2010	Rasche & Chia	Researching Strategy Practices: A Genealogical Social Theory Perspective	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice Methodological reflections
2010	Jarzabkowski & Balogun	The Practice and Process of Delivering Integration through Strategic Planning	<ul style="list-style-type: none"> Strategizing in different contexts
2009	Spee & Jarzabkowski	Strategy tools as boundary objects.	<ul style="list-style-type: none"> Tools/Techniques
2009	Jarzabkowski & Spee	Strategy-as-practice: A review and future directions for the field.	<ul style="list-style-type: none"> Definition of the s-as-p agenda and/or frameworks
2009	Kwon, Clarke & Wodak	Organizational decision-making, discourse, and power: Integrating across contexts and scales	<ul style="list-style-type: none"> Discursive aspects of strategy Issues of power
2009	Giroux, Beaulieu & Cooren	Gérer les chaînes logistiques humanitaires : l'expérience de Médecins sans frontières	<ul style="list-style-type: none"> Others
2009	Sloan	L'engagement des dirigeants envers les parties prenantes: condition de succès du développement durable.	<ul style="list-style-type: none"> Others
2009	Angwin, Paroutis & Mitson	Connecting Up-Strategy: Are Senior Strategy Directors (SSDs) a Missing Link?	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2009	Pälli, Vaara & Sorsa	Strategy as text and discursive practice: A genre-based approach to strategizing in city administration	<ul style="list-style-type: none"> Discursive aspects of strategy
2009	Vaara	Causation, counterfactuals and competitive advantage	<ul style="list-style-type: none"> Methodological reflections
2009	Laine	Work Practices as Strategy--An Alternative to Strategy as Practice Research.	<ul style="list-style-type: none"> Discursive aspects of strategy Strategizing in different contexts The role/identity of the participants to the strategizing process
2009	Moisander & Stenfors	Exploring the edges of theory-practice gap: epistemic cultures in strategy-tool development and use	<ul style="list-style-type: none"> Tools/Techniques
2009	Eppler & Platts	Visual Strategizing the Systematic Use of Visualization in the Strategic-Planning Process	<ul style="list-style-type: none"> The role of formal practices Tools/Techniques
2009	O'Brien	Supporting strategy: A survey of UK OR/ MS practitioners	<ul style="list-style-type: none"> Tools/Techniques

Year	Authors	Title	Classification
2009	Pälli, Vaara & Sorsa	Strategy as text and discursive practice: A genre-based approach to strategizing in City Administration.	<ul style="list-style-type: none"> Discursive aspects of strategy
2009	Harisson & Comeau-Vallée	The Social Economy and Labour: Strong Identity and a Few Paradoxes.	<ul style="list-style-type: none"> Others
2009	Langley	Temporal bracketing.	<ul style="list-style-type: none"> Others
2009	Langley	Studying processes in and around organizations	<ul style="list-style-type: none"> Others
2009	Langley	Processual case research". In Sage Encyclopaedia of Case Study Research	<ul style="list-style-type: none"> Others
2009	Jarzabkowski, Lê & Van de Ven	Doing which work? A practice approach to institutional pluralism	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2009	Jarzabkowski	Shaping strategy as a structuration process	<ul style="list-style-type: none"> Exploration of different theoretical perspectives Strategizing in different contexts
2009	Carter, Clegg & Kornberger	Strategy as practice?	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice
2009	Jarzabkowski & Seidl	The Role of Meetings in the Social Practice of Strategy	<ul style="list-style-type: none"> Strategizing in different contexts The role of formal practices
2008	King	Strategizing at leading venture capital firms: of planning, opportunism and deliberate emergence.	<ul style="list-style-type: none"> Strategizing in different contexts
2008	Whittington & Cailluet	The Crafts of Strategy - Special issue introduction by the guest editors	<ul style="list-style-type: none"> The role of formal practices
2008	Heracleous & Jacobs	Understanding organizations through embodied metaphors.	<ul style="list-style-type: none"> The role of materiality The role of sensemaking
2008	Kaplan	Framing Contests: Strategy Making Under Uncertainty	<ul style="list-style-type: none"> The role of sensemaking
2008	Giraudeau	The drafts of strategy: Opening up plans and their uses.	<ul style="list-style-type: none"> The role of materiality
2008	Mantere & Vaara	On the problem of participation in strategy: A critical discursive perspective.	<ul style="list-style-type: none"> Discursive aspects of strategy Issues of power
2008	Phillips, Sewell & Jaynes	Applying critical discourse analysis in strategic management research.	<ul style="list-style-type: none"> Discursive aspects of strategy
2008	Mantere	Role expectations and middle managers strategic agency	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2008	Nordqvist & Melin	Strategic planning champions: Social craftspersons, artful interpreters and known strangers	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2008	Ezzamel & Willmott	Strategy as discourse in a global retailer: A supplement to rationalist and interpretive accounts	<ul style="list-style-type: none"> Issues of power
2008	Regnér	Strategy-as-practice and dynamic capabilities: Steps towards a dynamic view of strategy.	<ul style="list-style-type: none"> Relation to other sub-fields of strategy
2008	Jarzabkowski & Whittington	A strategy-as-practice approach to strategy research and education	<ul style="list-style-type: none"> Introduction to Strategy as Practice
2008	Jarzabkowski & Whittington	Hard to disagree, mostly.	<ul style="list-style-type: none"> Critical reflections on strategy-as-practice
2008	Jarzabkowski & Whittington	Directions for a Troubled Discipline – Strategy Research, Teaching and Practice.	<ul style="list-style-type: none"> introduction to Strategy as Practice

Year	Authors	Title	Classification
2008	Heracleous & Jacobs	Crafting Strategy – The Role of Embodied Metaphors.	<ul style="list-style-type: none"> Discursive aspects of strategy
2008	Statler, Jacobs & Roos	Performing Strategy - Analogical Reasoning as Strategic Practice.	<ul style="list-style-type: none"> The role of materiality
2008	Harbour & Kisfalvi	Le courage des leaders	<ul style="list-style-type: none"> Others
2008	Vaara & Tienari	A discursive perspective on legitimization strategies in MNCs.	<ul style="list-style-type: none"> Discursive aspects of strategy
2008	Marshak & Grant	Organizational Discourse and New Organization Development Practices.	<ul style="list-style-type: none"> Discursive aspects of strategy
2008	Nayak	Experiencing creativity in organisations: A practice approach	<ul style="list-style-type: none"> Exploration of different theoretical perspectives Issues of power Relation to other sub-fields of strategy The role/identity of the participants to the strategizing process
2008	Ocasio & Joseph	Rise and fall - or transformation? The evolution of strategic planning at the General Electric Company, 1940-2006	<ul style="list-style-type: none"> Strategizing in different contexts The role of formal practices The role/identity of the participants to the strategizing process Tools/Techniques
2008	Voronov	Toward a practice perspective on strategic organizational learning.	<ul style="list-style-type: none"> Issues of power The role of sensemaking
2008	Mantere & Sillince	Strategic Intent as a Rhetorical Device.	<ul style="list-style-type: none"> Discursive aspects of strategy
2008	Mantere & Vaara	On the problem of participation in strategy: A critical discursive perspective	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2008	Mantere	Role Expectations and Middle Manager Strategic Agency	<ul style="list-style-type: none"> The role/identity of the participants to the strategizing process
2008	Bourque & Johnson	Strategy Workshops and “Away-Days” As Ritual.	<ul style="list-style-type: none"> Exploration of different theoretical perspectives
2008	Jarzabkowski	Strategy as practice	<ul style="list-style-type: none"> Introduction to Strategy as Practice
2008	Balogun, Pye & Hodkinson	Cognitively Skilled Organizational Decision making: Making Sense of Deciding.	<ul style="list-style-type: none"> The role of sensemaking
2008	Denis & Lehoux	Capabilities, Processes, and Codification: An Organizational Perspective on Knowledge Use.	<ul style="list-style-type: none"> Others
2008	Royer & Langley	Linking rationality, politics and routines in organizational decision making.	<ul style="list-style-type: none"> Others
2008	Statler & Oliver	Facilitating serious play.	<ul style="list-style-type: none"> Others

Source: Strategy as Practice International Network (2018)

APPENDIX E
- Extracts from interview transcripts -

99 follow a typical classical way of doing strategic planning I describe to them what I believe should be in
 100 each of the component source of teaching planning
 101 Which was a mission and vision, strategic goals and strategic objectives The marketing component the
 102 competitor analysis The situational analysis components and the Best financial indicators and then I
 103 allowed the strategic planners to formulate in their own Minds what the strategy should be. I think took on
 104 the position of overseer or Mentor to see what the strategic plan they had developed looked like I then
 105 gave my input and we discussed each of the components of the strategic plan and spoke about why each
 106 of the components was created and what was the rationale behind it and what was the evidence behind it
 107 and in the end it was a cooperative process of developing a strategic plan for the client
 108

sharing view
 sharing view
 tool determines (components)
 tool determines (components)
 formulating strategy (independi
 manager (mentoring)
 discussing (components)
 discussing (rationale/evidence)
 cooperating (team)

109 **Strategy Tools**

110
 111 You already mentioned quite a few strategy tools. What is the role of tools in your work as
 112 strategy consultant?
 113

114 Well it is critical to have a strategy tool because it gives your strategy some structure it allows you to
 115 focus your thought process is along certain lines according to the definition so the standard strategy tool
 116 that was originally created by Harvard University in the 1960 s was the one that I have just mentioned it
 117 terms of the vision mission objectives goals and so forth these are clearly define definitions and by
 118 following those definitions One cannot wear off the topic these tools may seem compartmentalizing The
 119 Strategy but in fact it does not it accurately gives direction for the company in order to achieve its ultimate
 120 objectives which is often contained in the vision and those are carefully thought out components which is
 121 followed step-by-step and is accurate evidence-based logical with a understanding the duration that one
 122 is in the company should achieve its ultimate vision unfortunately most or many companies do not
 123 understand their strengths and their weaknesses and then fail to capitalise on opportunities and threats
 124 that are out in the market most companies overestimate their strength they hide their weaknesses and by
 125 so doing tackle opportunities that very often are beyond their means also many companies do not look at
 126 other factors that influence the organisation very often they do not look at political undercurrents that are
 127 occurring that prevail both locally and internationally Many organisations don't look at social
 128 circumstances of people that are the major customers or the major clients so companies often for short on
 129 that and I think they fall short on that because one they get embroiled in Chasing profits and not
 130 understanding that tasting prophets cannot be done in isolation they need to be done using specific
 131 strategic tools.
 132

tool determines (structure)
 tool determines (thoughts/thinking)
 formally created
 tool determines (clear components)
 tool determines (topic)
 tool determines (direction)
 tool determines (content)
 tool determines (process)
 understanding (organis. awareness)
 understanding (capabilities)
 understanding (capabilities)
 understanding (environment)
 tool determines (contextual und)
 tool determines (contextual und)
 pursuing economic benefits
 pursuing economic benefits
 appropriateness of tools

133 Do you think that anyone can use strategy tools? Why?
 134

135 No I do not think I think one has to have quite a deep understanding of each of the tools and also to have
 136 critical thinking capabilities to be able to implement these tools particularly at a organisational level which
 137 can be complex I mean everybody uses strategies to survive in their daily lives those strategies are very
 138 often inherited strategies or strategies they have learnt from their parents or learnt from trial and error and
 139 are basically life skills in order to survive so organisational strategies were organisations of complex
 140 organisms if you'd like to use that metaphor require a different skill sets and certainly a different
 141 intellectual level to be able to apply it to the organisation. I think the team had a very good understanding
 142 of the components of strategic planning But what they did not have is the knowledge of that particular
 143 sector so that is a weakness I think it is quite critical that a strategist understand the sector that they are
 144 dealing with and I know that they are schools of thoughts that a strategist should have no knowledge of
 145 the industry and should be an Outsider and therefore can direct the strategic planning session but I
 146 disagree with that.
 147

understanding (tool application)
 appropriately skilled (critical thinking)
 replicating strategies
 learning strategies
 organisational context
 organisational context
 understanding (tool components)
 understanding (industry)
 appropriately skilled (knowledge)
 appropriately skilled (knowledge)
 directing planning

199 **When you choose the tool at inception of the project, how did the team decide to use this**
200 **specific tool?**
201

202 So, I think (inaudible)... most of our engagements follow a similar kind of trend. I think we see or view
203 this particular tool's effect in that previous projects that are of a similar nature as well as the, I think, the
204 knowledge that we have developed in said tool, there's a variety of factors I think, trying to, for particular
205 problems we would use particular tools and that has almost become institutional knowledge and we
206 can say we use it based on past experience or based on we've used it before. We also constantly, I
207 think, looking at new tools etc. so depending on the strategy when we start planning the project we have
208 a fairly good understanding, well we try and explore, we try and think what tool we could use, and we
209 get to the decision by that.

choosing strategy tools (trend)
choosing strategy tools (reproducing)
choosing strategy tools (understanding)
choosing strategy tools (institutional knowledge)
choosing strategy tools (previous experience)
choosing strategy tools (exploring)

211 **Of all the factors you have just mentioned, can you particularly remember if this decision fell on**
212 **a specific person? Was there more say from one than another?**
213

214 I don't think it was ever a debate, but I think the... You see, how the engagements work is that there's
215 usually a proposal that goes through before you even get contracted to do the particular engagement,
216 and the expectation from the client is usually that in these proposals that you already articulate your
217 framework or approach that you would take in solving a particular problem and to be honest, I think the
218 senior managers would probably guide the proposal development, so there won't be too much of a
219 debate, so it would probably be the senior managers or the project leadership team that actually
220 chooses the methodology or the approach. But there's not much debate, I think in the team – usually if
221 makes sense it makes sense, and also like we've used these tools that we use for a long time, so it is
222 kind of like the way we all think about strategy. So, there's not much debate if that makes sense.

engaging (contracted)
proposal (expectations)
proposal (set framework)
proposal (senior management)
proposal (senior management)
choosing strategy tools (senior management)
choosing strategy tools (sensemaking)
choosing strategy tools (long-time use)

224 **Once you have decided on using this tool – what were the first initial steps that were taken?**
225

226 I think in the broader project engagement I think, once the proposal has been signed off and the project
227 team actually starts, it would probably be like the start of period where you try to understand, read
228 documentation to understand more, immerse yourself, try and understand the client's problem. This
229 particular tool that we use, it really starts kicking in where we actually try and articulate the aspiration
230 of what the client is trying to achieve and what we are here to do (32:08). So that's the first step, and
231 that could be interviews, or other talks, mostly trying to understand the client's problem.

signing off (problem)
understanding (problem)
information gathering (immersing)
articulating (needs)
understanding (needs)
interviewing (needs)
conversing (needs)
understanding (problem)

232 **And who does the work?**
233

234 The delivery team would typically do the work, but it would be guided by senior consultants, or a
235 manager. These individuals would speak and conduct the interview and try and solicit information and
236 then the consultant or analyst would use some content that can be played back to the client to confirm
237 that these are indeed the aspirations, or set, what they are trying to achieve. So, everyone has a piece
238 of work to do, but it is mostly the delivery team that would be involved in this particular step.

working (delivery team)
interviewing (senior consultants)
information gathering (consultant)
feedbacking (consultant)
confirming (consultant)

241 **How did you decide who's going to do what?**
242

243 I think this could differ a lot. I think there's a few things they would look at. Who's got experience, who's
244 doing what, who's got certain industry knowledge, who's got certain competencies, are there certain
245 individuals who's got, or have a desire to develop a particular area or are particularly good, or enjoy, or
246 get energised by a particular piece of work. So it's usually left to the project manager's discretion around
247 how work gets allocated, they would need to take into account these factors that I've mentioned, or they
248 typically do when allocating work.

sharing workload (competencies)
sharing workload (experience)
sharing workload (knowledge)
sharing workload (desire to do)
sharing workload (personality)
sharing workload (manager's discretion)

245 some of the methodologies, you can copy some of the ways they have done the calculations. I haven't
246 seen that they have copied the methodology because the whole sell is that they try to do the nine levers,
247 especially for strategy (25:14), [redacted] but I am sure they have one - we all
248 do.

practices (calculations)
strategy tools (selling, feature)
strategy tools (characteristic)

249
250 **Why do you use strategy tools in your strategy work?**
251

252 I think the whole concept behind it is just to have a very sordid framework. so you don't want to be out
253 there just doing everything. when you've got a very well defined tool and you understand how it works.
254 you can almost narrow it down. [redacted] is connected, if you for
255 [redacted]
256 all looks like the ladder. if you move this lever - how does that impact that part and how does it impact of
257 that part. so it is kind of it's always interconnected right, but the reason, the whole point of using us that
258 you just need a structured framework. I think if it didn't have that you can easily get lost in creating many
259 different things, many different strategie, or whatever the case is. so I think the main reason for using that
260 is just to give some kind of structure, some kind of methodology of flow, and I think with a big
261 organisation, my personal opinion is that if it is done in Australia within this sector and this industry you
262 can kind of leverage off of it because you have done the same sort of, you've used the same tool to do
263 the same or similar type of analogy. Then it is easy to for them to leverage off of that. cause we see that
264 happen all the time. [redacted] it was
265 [redacted]
266 [redacted] has. so when you talk about strategy tools, yes there are many of them but as a whole, they have
267 like an entire platform where you can just go Google tools that we use like value delivery framework or
268 target operating model, there's entire methodologies, frameworks, and tools and explanations of it on their
269 internal portal.

tool determines (framework)
tool determines (scope)
tool determines (focus)
tool determines (theoretical explai)
tool determines (focus)
tool determines (structure)
tool determines (focus)
tool determines (type of strategi)
tool determines (methodology)
tool determines (replication)
tool determines (replication)
tool determines (advantage)
platform (internal)
platform (math-ol-nies)
platform (strategy tools)
platform (variety)
platform (strategy tools)
platform (internal)

270
271 **You have earlier mentioned hierarchy - what does your team look like on a project basis?**
272

273 I think it is dependent per project. the projects that I have personally worked on, we've only been a
274 maximum of 3 people. so it is generally just been me and a manager, [redacted] So
275 always very small teams, I'm not entirely sure why (28:01). Maybe the project size, but some of the
276 projects we've acquired were pretty big, a lot of work, it's just how it was structured, I think for budget
277 purposes and all of that.

team composition (hierarchical)
team composition (small team)
team composition (project size)
team composition (work load)
team composition (available resources)

278
279 **Does the role of each person in the team differ, when you use these strategy tools?**
280

281 So I think the partner would kind of work more from high level perspective to say, you know, these are the
282 [redacted] need to consider to give you guidance on each one of them to figure out you know it is the
283 analysis you need to do. The manager would kind of guide the report, more or less in my last couple of
284 projects (except for the one that I am currently working on) I did most of the work. the manager will kind of
285 then, of the AD, depending on how strong either of them are, will kind of decide what the flow of the
286 report should be like, with the partner giving oversight of I think these [redacted] you need to
287 consider to be able to solve this you need to do analysis in x, y, and z. The AD and manager will say, this
288 is kind of what the report should look like, create that template, and then they consultant level and below
289 will... How I've worked is that my manager and I have always split the portions of work so "I will do that,
290 you will do this, I will review, we can update and add it in", so I have not been on a project where I have
291 been the only one doing analysis my manager has always worked alongside. so she will do some and I
292 will do some and then we can obviously compare to see if our thought process was the same. I do not
293 think experience is the same for everyone I think some people are kind of just like "you need to do more

advisory role (partner)
guiding role (partner)
guiding role (manager)
guiding role (manager)
advisory role (partner or manage)
overseeing role (partner)
instructing role (partner)
instructing role (partner or man)
sharing workload
sharing workload
sharing workload
comparing workload
shaving workload (varying)

148 where there are overlaps, and some of the changes that need to be made. This was used to inform a
 149 selection of representatives from the client side, so a beneficiary sample for interviews which we used as
 150 an input to the personas. So the personas are personalised archetypes - so you are bringing the archetype
 151 to life. That is the process that actually took place: we selected a sample of about 25 beneficiaries across
 152 different geographical areas, we interviewed them to get an indication of some of their key concerns, the
 153 burning issues, the challenges and so forth, and we used that to "massage the archetypes
 154 into real life personas, which is a more personalised representation of their needs and concerns so we can
 155 define the beneficiary journey.

detailing
 implementing
 personalising
 sampling
 interviewing
 "massaging"
 personalising
 defining

157 You mention that you used *general knowledge* to predefine concepts before introducing these to
 158 the client - who was involved in this, and how was this done? Take me through a typical setting
 159 where you would sit and populate this.

160 It was actually addressed within the initial stages of the project, where we had a cross functional team. It
 161 was actually a problem solving-type session where we sat. There were three managing directors present,
 162 two senior managers (I think), a manager and myself - where we defined what these guys (beneficiaries)
 163 typically look like based on similar projects that we have delivered previously. And we said, "okay: we know
 164 that there is a group of startups but have never necessarily operated within their environment looking for
 165 opportunities. We know that there are semi- matured organisations that are trading within the client, we
 166 know that there are those that are matured and are handling highly complex goods", and that is sort of how
 167 we started with enhancing and unpacking our initial thinking. And then we started departing from there
 168 saying: "okay there are some similarities here, however it cannot necessarily treat this instance in the same
 169 way as other instances", and that is where we started splitting them up, to make sure that the beneficiary
 170 journey that we were going to define, was specifically or will specifically address the distinctive needs of
 171 each of the beneficiary archetypes that we would be looking at.

team (cross-functional)
 problem-solving
 hierarchical team
 experience (defining)
 defining
 characterising
 categorising (unpacking)
 thinking
 analysing
 setting
 aligning to objectives

174 The cross-functional team were additions from the firm, but not necessary part of the team throughout the
 175 project. How did they influence the work? We had the client lead from there (is in charge of most if not
 176 all client engagements with this particular client), we had our CEO for strategy who sort of overlooks a lot
 177 of the strategy projects that we undertake and provide sort of a point of view, in terms of how we should
 178 proceed. We had a managing director who is a subject matter expert when it comes to economic and
 179 supplier development, and we had the two senior managers that were in the space also who were some
 180 sort of subject matter experts, as well as a manager and myself who had delivered similar types of projects
 181 at other clients.

team (changing)
 client (lead)
 client (executive)
 client (perspective)
 SME
 management (senior)
 hierarchical structure

183 How do you feel about them being involved? I am of the school of thought that the more people that
 184 look at or challenge a specific topic, the better the outcome, because you then have different perspectives
 185 embedded in it. So I think because we come from different backgrounds, and we looked at it with different
 186 lenses, it definitely enhanced the final output because with previous experiences you might be biased into
 187 pre-defining it into what you previously did whereas the dynamics might be slightly different and having
 188 different people provide the input and challenge whatever it is that you put in front of them definitely
 189 enhances the output I think that the more people who take a look at it and challenge it and provide the input
 190 and influence it, the better the outcome.

thinking (schools of thought)
 multiple perspectives (enhances)
 diversity (perspectives)
 diversity (enhances)
 diversity (reduces bias)
 multiple perspectives (challenges)
 multiple perspectives
 enhancing outcomes

192 Any conflict during these meetings? There was not necessarily any conflict but there is always a
 193 difference in opinion across all these projects that we deliver. But if their recommendation is valid I think it
 194 is absolutely proceeded with, so we go with what makes more sense rather than what makes sense to one
 195 individual.

no conflict
 differencing in opinion
 validating (opinion)
 validating (multiple input)

294 make sure that it is in fact correct. I think other biases also entail around the actual story that you are
295 saying, so depending on how one person sees the world, the story could be about generating more profits
296 and then sort of your presentation will have a flow linked to that but in another case, it could be around
297 understanding which markets to focus on next where it is not necessarily a profit question, but it is about
298 a business growth question and expansion question. so, in that case there is perhaps different sets of
299 biases, not necessarily wrong, but it is about taking that storyline through with the client, so the client is
300 actually getting what he originally paid for (38:08).

being biased (narrative)
being biased (perspective)
being biased (practices)
being biased (perspective)
being biased (varying)
being biased (narrative)
client-centric (value for money)
economic persp.

302 **Standardising strategy - explain what you mean and how this takes effect in your work? (38:23)**

303 With regards to standardization I think it is more around ensuring that you have covered the key boxes in
304 terms of research in terms of delivery so in the whole where to play how to win sort of sections it is about
305 understanding your customer, your product, your geographies. those are typically key factors that always
306 needs to be present. so, the standardization from a process and content perspective, is around ensuring
307 that all these elements are always covered. Then there is an elements of standardization when it comes
308 to delivery this is just making sure that your delivery would work so the fact that, you know, when you
309 present something there is no uppercase lowercase jumps, there is good readable constructs and bullets,
310 that everything is grammatically correct, no spelling errors, everything is aligned so that to the eye it looks
311 neat and not cluttered I think that is also another way of standardization.

standardising (content)
standardising (process)
standardising (content)
standardising (adhere to practice)
standardising (content)
standardising (replication for delivery)
standardising (quality)
standardising (quality)

313 **What role does standardisation play in the use of strategy tools?**

314 I think standardisation gives you a baseline to kick off from, because, just because something is
315 standardised does not mean it is going to work for every situation, so I think standardisation gives you
316 that opportunity to have an additional hypothesis, have an initial baseline, and from there sometimes that
317 baseline is enough and you have covered enough detail within that. and other cases working from that
318 baseline there might be other elements missing but because of the process followed to get to that
319 baseline you will have apparently have identified additional initiatives and opportunities that can be
320 considered further (40:30).

standardising (baseline for replicating)
standardising (baseline)
standardising (content)
standardising (process)
standardising (exploit variances)
standardising (exploit variances)

324 **Next step explained.**

325 [redacted] This is essentially defining the value proposition to your customers,
326 the sources of defensible advantage, what the profit models might be, which partnerships will be
327 leveraged, how the engagements will be conducted. so it is essentially just a next layer on the where to
328 play. A bulk of the work goes into the where to play because essentially you are setting on what your
329 baseline is and in the how we will win it is essentially about identifying the best ones for this organisation.
330 Based on the goals and aspirations from the previous phase, based on the organisation's strengths,
331 weaknesses, what your competitive position is, you identify that "these certain markets, these certain
332 regions" are the areas that we want to break into (41:23).

tool determines (process)
tool determines (organis awareness)
tool determines (process)
tool determines (resource allocation)
prioritising
tool determines (process)
prioritising
prioritising

334 **Explain the process. (41:48)**

335 [redacted] defining your value proposition so it is using the information that we have
336 gathered in the where to play to define what your business model is essentially is and as part of this
337 business model going into the rigor of this is how the business is going to generate revenue, these are
338 the levers that the business is going to pull on, and this is how fundamentally the channels, the
339 processes, and everything will work for the business to function. It goes into a level of detail that gives
340 enough clarity on building a business of this nature or whatever nature it is (42:30).

decision-making
decision-making
applying rigour
decision-making
decision-making
decision-making

342 **How is this type of information obtained?**

APPENDIX F
- Language editor letter -

shift expressions

To whom it may concern,

Language editor letter

This letter serves as confirmation that I have been the final language editor of this Doctoral thesis authored by Philip P. McLachlan.

The purpose of this was to ensure that, where possible, punctuation, grammar and phrasing conform to the accepted language standards; and that a logical flow of ideas was achieved.

This also confirms that I obtained an Honours Degree in Marketing and Communication Management from the University of Pretoria in 2002.

I can be contacted on the details listed below. I would be happy to answer any queries you may have.

Regards



Karishma Daya



68 Bhoola Road, Effingham Heights, 4051

072 222 9020

karishma@shiftexpressions.co.za

www.shiftexpressions.co.za