



DEPARTMENT OF BUSINESS MANAGEMENT

INVESTIGATING SENSE RECEPTION IN STRATEGY TRANSLATION

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ABSTRACT

INVESTIGATING SENSE RECEPTION IN STRATEGY TRANSLATION

by

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Strategic competence has been found to be declining in certain geographical areas and industries with poor implementation often predominantly attributed to ineffective communication. However, based on addressing communication only, and even with the apparent attribution of implementation failure, the gap still remains.

Various frameworks have been developed and studies conducted in line with sense making and strategy but with limited focus on the receivers of the translated strategy. This study aimed to offer a novel alternative framework to understanding strategy implementation failure, by creating insight on the role of sense reception on strategy translation and, ultimately, how it may affect strategy implementation.

The study was qualitative in nature with a phenomenological design. It was deemed appropriate as it allowed for an in-depth understanding of emotions, motivations, perceptions and self-described behaviour of the participants. Each organisation has its own language and symbols and these all have an impact on sense making. Therefore, this study firstly interrogated strategy translation from an organisational perspective to investigate the collective sense and then from an individual perspective to understand sense reception better. Data from 23 individuals from two organisations were collected in the form of semi-structured, open-ended interviews held during October and November 2018.

In conclusion, the concept of a hierarchical sensing loop was brought forward and the findings highlight that understanding the loop is critical to strategy implementation as any breakdowns in the loop or mismatches between the various processes may impact strategy implementation negatively. The five key elements of sense reception were explored thoroughly and their presence confirmed as a prerequisite for effective strategy translation. Finally, the study further revealed that due to the variation in cognition, levels of experience and organisational structure, sense reception might not always take place and thus hinder translation of a strategy.

KEY WORDS

Sense making

Strategy translation

Sense reception

Cognition

Meaning making

Sense giving

First and foremost, I thank my Mother,

Elizabeth Letsholo,

for her love and support throughout my life.

Without her, I would not be here to achieve my PhD qualification:
her work ethic of constantly working tirelessly even when it is difficult
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a botshelo. Bothale ba phala bo tswa phalaneng.

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blessed.

WHEN FREEDOM IS AN ILLUSION

“You can’t compete with an illusion and expect to win” – RGL

A soft breeze blows on a warm summer’s day. In that moment I sit, a scribe uninspired, a scribe in mid slumber... a scribe almost thoughtless – I said “almost”... for the notion of emptiness is one that persistently deludes me... and emptiness of the mind? Even more so. For to be hollow you must be surrounded. The assembly of self, resides not in emptiness. Though it cunningly appears to be born from emptiness; from something we have all emerged... and so emergence becomes the silhouette of our existence.

As quickly as it descended, near thoughtlessness evaporates and, in its place, a steady flow of questions gives form to thought. The prevalent question: “What have we just been through?”

The answer is so paradoxical that it leaves one teetering between weeping and laughing. The answer is both clear and immersed in mystery. It is both common and relative and it breaks as easily as it builds.

“What have we just been through?” Do I dare demystify what time has made us?

“I’m ‘damned if I do and damned if I don’t!”

Time... Oh, you untouchable delight... look what have you done...

Brokenly complete, insignificantly critical, life-alteringly perpetual, brilliantly mediocre, sinfully holy, wildly tamed, decadently bland, restlessly content, importantly trivial and mundanely passionate! Oh, time... look what you have made us do!

Somnambulists in a world that demands... No, enforces, “woke-ness”, herds that preach individuality, uproariously serious moments that are often angelically deceptive. Mankind has become dishonestly loyal while constantly claiming illusionary depth!

It’s a comedy of errors... we are controlled but are out of control. We are, at once, everything and nothing. Like love unrequited, we are forcefully metamorphosised! Bound and strenuously altered. Held together by ideals... informed by an often-warped past. Ceaselessly we catapult into an undiscovered future. With an unsteady gait we venture into the unknown.

A distant call of a lonesome bird, the calming drone of a swarm of bees and a breeze as cool and soft as a lover’s caress rouses the slumbering scribe and brings her back to near thoughtlessness... with a lethargic body, an unfocused gaze, a heavy head and an empty soul... Yes! I said *empty*... I find myself wondering... “What the hell have we just been through?”

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ABBREVIATIONS AND ACRONYMS

COO	Chief Operations Officer
CEO	Chief Executive Officer
Exco	Executive Committee
FSC	Financial Sector Conduct [Authority]
GECE	Growth Engagement Conversion Efficiencies
ITTD	Interview To The Double
JSE	Johannesburg Stock Exchange
KPI(s)	Key Performance Indicator(s)
KPS(s)	Key Performance Area(s)
Manco	Management Committee
MM	Meaning Making
PPE	Personal Protection Equipment
RSA	Republic of South Africa
SG	Sense Giving
SM	Sense Making
SR	Sense Reception
ST	Strategy Translation
STI	Strategy Translation Interface
SWOT	Strengths, Weaknesses, Opportunities and Threats
UK	United Kingdom (of Great Britain)
USA	United States of America
USD	United States Dollar(s)
ZAR	South African Rand(s)

CHAPTER 1: INTRODUCTION

1.1 BACKGROUND

It has been reported widely that ‘strategy implementation’ in organisations remains an ongoing problem. Strategists and researchers alike have indicated concerns about translating strategy into action (Guth & Macmillan, 1986; Floyd & Wooldridge, 1992; Sterling, 2003; Schaap, 2006; Salih & Doll, 2013; Birshan, Gibbs & Strovink, 2014; Cândido & Santos; Chaudhary & Srivastava, 2021). Abundant difficulties lie between the processes of ‘strategy formulation’ and the reality of ‘implementation’ (Beer & Eisenstat, 2000). Furthermore, poor implementation is attributed predominantly to ineffective communication (Rapert, Velliquette & Garretson, 2002; Aladwani, 2001; Sterling, 2003; Atkinson, 2006; Miniace & Falter, 2006; Kamel & Fatima, 2019).

‘Communication’ as a factor in ‘strategy translation’ cannot, therefore, be disregarded because it seeks to create a ‘shared understanding’ of the strategy and plays a vital role in the ‘implementation’ process (Rapert *et al.*, 2002; Henri, 2004). The issue of poor- or non-implementation, therefore, appears more complex than allocating blame solely on communication failure. There is a need for more specificity in articulating where communication difficulties arise in progressing between strategy formulation and strategy implementation (Zeps & Ribickis, 2015). To do this, a shift in focus away from communication may be appropriate.

Classically ‘strategy making’ begins with top management making sense of and responding to environmental stimuli (Nørreklit, 2000; Baker & Nelson, 2005; Johnson, Scholes & Whittington, 2008; Leonardi, 2015). Consequently, how this level of management makes sense of the environment as well as its ‘implications for strategy’ is typically conveyed to next-level managers in the management hierarchy.

This study proposes that ‘effective strategising’ consists of a combination of ‘sense making’ and ‘sense giving’. Thereafter, it opines that ‘sense reception’ is the missing link in effective ‘strategy translation’. Exploring alternative views such as researching the ‘strategy implementation gap’ from a ‘sense-making perspective’ may inform

understanding of how individuals 'use sense to translate strategy'. This information would be based, *firstly*, on individuals 'processing information of a strategic nature given to them' and, *secondly*, in 'turning what has been communicated into actionable results' (implementation) (Heinrichs, 2021; Hardy & Thomas, 2014; Cunliffe & Coupland, 2012).

'Communication' is considered one tool to translate strategy from 'formulation' to 'implementation'. However, based on addressing only communication – even with its apparent attribution of implementation failure – the gap remains, thus confirming that there exists a need to address the 'implementation gap' from a different perspective.

1.2 PURPOSE OF THE STUDY

The **purpose** of this study is to investigate and instigate the conversation regarding the dynamics between the two well-known sensing concepts ('sense making' and 'sense giving') as well as the proposed concept 'sense reception', while attempting to increase an understanding of their influence on 'strategy translation'. The key definitions that will guide the study include: 'sense making', 'sense giving', 'meaning making', 'sense reception' and 'strategy'. A full list of definitions of the key concepts is contained in **Table 3.1**. An enhanced framework for 'strategy translation' was developed with the purpose of addressing the 'strategy implementation gap'.

The proposed framework is of cardinal importance, as it reflects the level of translation that takes place during the strategy process. This level of translation could influence how the strategy is understood and, ultimately, implemented. Skærbæk and Milander (2004) indicate that prior to becoming an established practice, strategy undergoes a 'fabrication' process which we link to the 'translation' of the strategy.

In translation of a strategy, managers should consider the 'fabrication processes' which are focused largely on overcoming sceptics, building networks of support, elaborating on meaning, and changing the understanding of its use.

‘Strategy translation’ in the context of the present study, therefore, refers to:

The transfer of a set strategy from the strategy formulator (sense giver) to the strategy implementer (sense receiver), for the purpose of contextualisation with the aim of ultimate implementation of the handed-down strategy.

‘Sense making’ and ‘sense giving’ have garnered a good deal of attention in management and strategy literature (Catasús, Mårtensson & Skoog, 2009; Moore, 2009; Linderman, Pesut & Disch, 2015).

This study goes further by adding ‘sense reception’ as an additional concept to the idea of ‘sensing.’ If there are breakdowns in the proposed ‘hierarchical sensing loop’– (which shows how the various forms of sense and strategy translation are unified) or mismatches between the intended strategy and what is actually sensed, then strategy implementation may be impacted adversely. This may even widen the execution gap between what was intended and what is implemented.

1.3 RESEARCH PROBLEM

The ‘research problem’ identified that, in spite of addressing and attributing communication as a key gap to ‘strategy implementation’, ‘strategy execution’ remains a problem. Thus, there is a need to develop an alternative view to ‘strategy implementation failure’ which focuses on the sense concepts in the translation of strategy.

1.4 RESEARCH QUESTIONS

The research questions that guide the study are:

1. Is ‘sense reception’ a plausible concept?
2. What is the relationship between ‘sense reception’ and ‘strategy translation’?
3. What informs the existence of ‘sense reception’ during ‘strategy translation’?

4. How can the proposed 'sense framework' address 'effective translation' across the management hierarchy?

The research aims to achieve the following objectives:

- To conceptualise the role of 'sense' in strategy and to propose a 'new sensing concept' known as 'sense reception'
- To gain insight into the practices and processes that are used and applied by the managers when embarking on 'strategy translation' across the management hierarchies.
- To identify whether or not the elements identified in the conceptualisation of 'sense reception' are present in practice.
- To develop an enhanced 'strategy translation framework'.

1.5 ORGANISATION OF THE DOCUMENT

This document is organised as follows: The **first** part reports on the 'implementation gap', then defines and expands upon the 'sensing concepts' that form part of what can be referred to as the 'hierarchical sensing loop framework'. I acknowledge that while 'strategy implementation failure' has been vastly reviewed, defined and linked with various factors, the issue of addressing the 'implementation gap' still remains. I reiterate potential and reported arguments for 'strategy implementation failure' as identified in literature. I contend that implementation failure needs to be addressed by factors that go beyond 'poor communication' within an organisation and that the focus should rather defer towards 'sense' and how it ultimately influences strategy, communication, comprehension and translation, down the management hierarchy and back.

In the **second** section of the document, 'sense' is linked to 'strategy translation'. I assess how 'strategy making' takes place traditionally within organisations by disassembling the hierarchy and looking at how strategising takes place on each level, taking into consideration the level of comprehension, expectations and actionable decisions of individuals.

Next, I explore the dynamics of 'sense making', 'sense giving' and 'sense reception' within the proposed 'feedback loop'. I propose how they are interactive processes that

may result in, or deter, effective 'strategy translation' at lower levels of the managerial hierarchy.

The concept of 'sense reception' is introduced and elaborated upon in showing the prominence of 'strategy translation'. Thereafter, I propose a framework for 'strategy translation'. This framework further directs focus onto 'sense reception'. Through the framework I look at the various factors that could have an effect on 'sense reception' and 'strategy translation'. I then consider the usefulness of the proposed frameworks for 'strategy implementation' and 'strategy translation'. **Finally**, I present recommendations and opportunities for future research.

1.6 STRUCTURE OF THE DOCUMENT

This thesis contains seven chapters. **Chapter 1** provides an Introduction to the study. **Chapter 2** contains the Literature Review. An interrogation of sense reception is contained in **Chapter 3**. **Chapter 4** provides an exposition of the research design, philosophy and methodology and presents a case study analysing the implementation of strategy in South African organisations. The findings are presented in **Chapter 5**, followed by a discussion of the findings in **Chapter 6**. The final chapter, **Chapter 7**, contains the conclusions, contributions, limitations, recommendations for further research and reflections on this study. The **References** and **Appendices** complete the document.

CHAPTER 2: LITERATURE REVIEW

Given the dynamic and often ambiguous nature of 'strategy' (Jasper & Crossan, 2012), as well as the unpredictability of the 'global strategic environment' (Moore, 2009:8), the reality is that managers need to continually interpret and make sense of what they 'see in the environment' (Baker & Nelson, 2005), thus influencing strategy choices. This interpretation and the steps leading to it must not, however, be isolated or allocated to a single individual or management level, as doing so may mean information and knowledge transfer does not occur between management levels (R'boul, 2021). To understand the processes involved in effective strategy translation at each level of the managerial hierarchy, attention in this study is directed towards the 'sense making', 'sense giving' and 'sense reception' as concepts.

Organisations need to move away from the notion that 'strategy making' is merely a 'top-down' approach as that may stifle organisational transformation and development. Nørreklit (2000) reasons that the top-down hierarchical approach tends to result in static and rigid strategic arrays which directly oppose the concept of 'change'. This is worrying for strategists as they need to be at the forefront of market developments, identifying changing circumstances and they must have the ability to challenge current belief and change their own minds (Randall, Resick & De Church, 2011).

Top-level management is generally more equipped to 'formulate' but not to 'execute' plans (Hrebiniak, 2013). The linkages in the hierarchy of policy, strategy and operations must, therefore, be observed carefully and understood because the logic at each level is meant to govern the one below and support the one above. Strategy fails when some link in the chain of 'cause-and-effect' from low-level tactics to high-level outcomes is broken (Betts, 2000).

When the formulators of a strategy pursue objectives, with the desired outcome in mind, but without reference to the requirements faced by the implementers, it can lead to a 'break' in the 'strategy translation chain' (Wallace, 2021). It is, therefore, imperative to understand how managers responsible for 'strategy formulation'

translate their sense to others, how subsequent levels in the organisation make sense of what has been conveyed; and how they 'make meaning' from what was conveyed (Chu, 2021). That is, there is a need to probe the 'interrelationships' among 'sense making', 'sense giving', and 'sense reception'. Improving these sensing processes may be precursors for effective strategy implementation. Furthermore, there is a need to address the potential interaction between 'sense giving' and 'sense reception'. At the intersection of these senses there may exist a potential influencer of 'strategy translation' which takes place between the 'sense giver' and the 'sense receiver'.

2.1 THE IMPLEMENTATION GAP

'Strategy formulation' traditionally occurs through following a specific process (Mintzberg, Ahlstrand & Lampel, 2009). This process posits that executives spend time on the 'formulation- and planning-process', after which they have a clear understanding of the 'strategic direction' in which the organisation ought to move and then they propose the actions required to 'drive the move in that particular direction'. The Chief Executive Officer (CEO) is typically portrayed, not only as the individual whose responsibility lies with setting the strategic directions and plans for the organisation, but also as the person responsible for guiding the actions that will allow for the realisation of those plans (Gioia & Chittipeddi, 1991).

The issue generally comes when it is time to make those plans actionable. Strategic activities involving 'planning' have been treated primarily as being 'intentional' and as something that involves only a few people at the top of the organisational hierarchy. In contrast, 'implementation' is treated as an unproblematic activity following upon planning activities (Ericson, 2001; Abdelmajid Ali & Khaled, 2020). In correspondence, Leonardi (2015:S18) conducted a study on the materialisation of strategy and found that, in some cases, executives conceptualise 'strategy making' as a process that 'ends just before implementation' and conveyed a comment made by one executive in the final formal 'strategy-making' meeting, namely: "Well, now we get to turn things over to the division so they can start implementing this vision" – thus paving the way to fill the gap.

Kezar (2012) established that scholars have noted the importance of understanding 'sense making' and 'sense giving' from the 'bottom up' (Maitlis & Sonenshein, 2010;

Maitlis & Lawrence, 2007). In her study she expanded upon this by investigating 'sense making' and 'change' from a bottom-up approach.

She confirmed what has been alluded to in previous research: that the traditional approach to 'strategy formulation,' and 'sense making' and 'sense giving' is top down. The 'bottom-up' approach to 'sense' has, more recently, also been examined. In attempting to further build on, and to understand, the bottom-up approach to 'sense', I propose the 'lens of the feedback-loop approach', which places emphasis on 'sense reception', as this is where action is generated.

Effective implementation of an 'average strategy' beats mediocre implementation of a 'great strategy' every time (Sterling, 2003). Organisations that focus on simply informing [dumping information] on their employees [usually the implementers] about the business strategy appear to be missing the point of 'effective strategising'. Before employees can act on a strategy, they must understand 'how' it relates to them, 'what' their role is and 'what' they can do to help deliver it (Jarzabkowski & Seidl, 2008; Gay & D'Aprix, 2007; Pretorius, 2016). 'Strategy making' often takes shape in executive suites involving top managers and, in some instances, highly paid consultants. It can, however, also occur in what might be considered mundane circumstances involving middle management as well as entry-level employees (Küpers, Mantere & Statler, 2012). Mintzberg (1994) points out that, in 'strategy implementation', it is often the case that middle managers know what is 'viable' and what is 'not', based on their 'on-the-ground' experience.

It is clear that when looking at gaps that relate to the conceptualisation and implementation of a strategy, we cannot direct our attention to a single management level. When thinking about strategy in practice, focus should lie with the individuals concerned and how their inherent nature could influence how the strategy message is translated along the organisational hierarchy and later reflected in the implementation of the strategy (Tan, Patt, Koh & Chen, 2020). Whittington (2006:616) highlights that 'strategy is not about *what organisations have* but it is rather about *what people do*'. As such, I am interested in the 'individual practices' and the 'interrelatedness thereof', rather than only the organisational practices.

'Translation of strategy', when looking at it from a sociological perspective, depends on the construction of episodic associations or relations to change the world (Collins, 2013). The story of the strategy translation was clearly not entirely an internal organisational matter but also involved a whole range of entities and actors outside the organisation (Stigliani & Ravasi, 2012).

In 'translating a strategy', the ideal approach is one that 'tells the story' of 'strategy construction' and 'new management initiatives'. This constructed strategy may then be seen as a way for management to provide context for the implementation of strategy (Skærbæk & Milander, 2004; Balogun & Johnson, 2016). Relating it back to the various roles played by each level of management, we need to understand the 'role of sense' on the strategic-management process and how the "story" is told along the management hierarchy.

During the formulation of a strategy the executives can be seen as 'sense makers' because they actually help form a 'strategic image' that takes place in visionary and evocative terms (Gioia & Chittipeddi, 1991). Top managers make sense of, learn from, and address, unique cognitive challenges embedded in the environments in which they operate. Their subjective interpretations of these environments help define the firm's strategic agenda (Nadkarni & Barr, 2008; Balogun, Jacobs, Jarzabkowski, Mantere & Vaara, 2014). To do so effectively, it is important to consider the 'line-of-sight' concept. This concept infers that it is important that there is a clear 'line-of-sight' from strategy formulation to implementation at all levels of the firm, which is inclusive of all members: organisational, group and individual (Buller & McEvoy, 2012).

Boswell and Olson-Buchanan (2007:592-610), Boswell, Bingham and Colvin (2006:499-509), and Olson-Buchanan and Boswell (2006:432-445) focused on the employee's 'line-of-sight' towards an organisation's strategic objectives and found that, while it is important for employees to understand a firm's strategic objectives as well as actions necessary to achieve those goals, what is more important is the employees' understanding of '*how they can contribute*' to the organisation's strategic goals. It can, therefore, be said that while formulation is where strategy traditionally starts, the consideration of 'effective strategy execution' early in the strategising process is critical (Mwangi & Kihara, 2021).

The goal of a well-planned strategy is its effective execution, because, as shrewdly observed by Speculand (2011), a 'well-executed strategy' is a business differentiator. He clarified that, when you have the 'ability to execute, you outperform your competition' and that 'strategy-formulation and -implementation' are, often wrongly, regarded as isolated events. The general perception among leaders in strategy is that the crafting or formulation of a strategy is the harder challenge. Based on this perception, most attention is generally geared toward formulation but it also means it is blamed when strategy implementation fails (Angus-Leppan, Metcalf & Benn, 2010; Stensaker, Falkenberg & Grønhaug, 2008).

Organisations often have mutually reinforcing barriers that may block strategy implementation and organisational learning (Beer & Eisenstat, 2000; Steigenberger, 2015). Many leaders are able to guess and believe with certainty why strategies fail, but it has become apparent that it is not enough to guess. When attempting to find the cause for failure of strategy implementation, the diagnosis must be corroborated with substantial data (Backman, 2020).

A manager's intuition (heuristics) is built up over years of experience and contains a vast quantity of tacit knowledge that can only be tapped into superficially by formal analysis (Mróz, 2020). These cognitive heuristics are, however, inherently biased (Bazerman, 1990; Tversky & Kahneman, 1986) because people tend to focus on a few variables and interpret them in a certain way. Strategists are tasked with determining how not to become stuck with out-dated cognitive maps and the solution, while contradictory, is that there is a need for both logical and creative thinking (de Wit & Meyer, 2005).

AbuJbara and Worley (2018) note that, to solve certain problems effectively, formulators must tap into their "soft skills" which include creative thinking, wisdom, sense making and visioning, as these are among the critical skills that are strongly related to a leader's problem-solving ability and overall leader performance. Once formulators start to do this, they may realise that their initial assumptions might have been wrong (Spence, 2002; Speculand, 2011). From this it is inferred that leaders must recognise that not only is implementation difficult, but that the challenges of implementation are often underestimated, and this can have dire consequences for a firm.

2.2 COMMUNICATION BLAMED FOR THE GAP

Communication is viewed as a continual process of making sense of situations in which individuals collectively find themselves and events affecting them (Hellar, 2009; Weick, Sutcliffe & Obstfeld, 2005). It is, thus, through communication that things, situations and entities come into existence (Golob, Johansen, Nielsen & Podnar, 2013). It is generally assumed that ineffective communication is the reason for non-implementation of strategy. This could be because senior managers are lulled into believing that a well-conceived strategy that is communicated to an organisation equals implementation (Beer & Eisenstat, 2000).

What many executives might fail to notice, as previously indicated, is that a well-conceived strategy is only *'one part of the strategy process'* (Pradhan & Sharma, 2020). What is critical to note is that, while they may seem to follow the same *'translation process'*, *'communication'*, *'sense making'* and *'sense giving'* are not the same. Catasús *et al.* (2009) explain that the task of communication has traditionally been understood as the transmission of information in an efficient manner from the sender to the receiver through an empty channel. The avoidance of "noise" would normally optimise the transmission (Speier, Valacich & Vessey, 1999). Bringing to mind the very pressing question: "If *noise* is effectively identified and done away with, why does the implementation gap remain?"

'Sense making' relates to *how* the members of an organisation actively give *'meaning'* to the communicated message. It is about the ways people generate what they interpret (Weick, 1995). *'Sense giving'* would then be represented when top management stages cues by communicating conveyed values, visions and preferred actions to middle- and lower-level management, respectively. Reporting, which can entail informing or giving feedback, is a *'sense-giving'* activity (Smith, Plowman & Duchon, 2010). From the identified implementation gap, however, it is clear that *'mere'* communication or reporting is not enough to enable management to translate strategy effectively (Simpson & Prusak, 1995).

A need exists for more innovative and transformative methods of addressing strategy implementation failure (Birshan *et al.*, 2014). Even so, it is important to note that, because of the difficulty that arises in alignment of a firm's *'strategic concept'* (formulated) and *'strategic action'* (implemented) when competing in extremely

dynamic environments, it is assumed that firms that compete in turbulent environments show a lesser degree of strategic implementation consistency (Schmidt & Brauer, 2006; Portman, Thirlwell, Donovan & Ellington, 2021). From available theory, it appears that there may be alternative reasons ascribed to strategy implementation failure (Sterling, 2003). It becomes apparent that there is, **firstly**, a need to effectively understand how sense, both influences and plays a role in strategising and, **secondly**, the importance of understanding how ‘multi-level sensing’ takes place in strategising.

Schaap (2012) states that successful strategy implementation is determined not only by the individuals who originally defined the strategy but rather that it is determined by the *logical decisions and actions of all employees at all levels* of an organisation. Strategy and strategic change must thus be reviewed. Understanding the ‘hierarchical sensing loop’, which is the first proposed framework developed for this study, may therefore be critical to strategy implementation.

Following the gap in literature, the following proposition was developed:

P1: Communication failure is an attribution of insufficient “causality” for poor strategy implementation.

2.3 UNDERSTANDING SENSE MAKING AND STRATEGY

“Sense making is tested to the extreme when people encounter an event whose occurrence is so implausible that they hesitate to report it for fear that it will not be believed.” People think to themselves... “It can’t be.... therefore, it isn’t” –

Karl Weick (1995:1)

‘Sense making’ is a well-established perspective in strategic management and organisational studies and is applicable to various industries (Alderman, Ivory, McLoughlin & Vaughan, 2005). Sandberg and Tsoukas (2015:10) identified 37 areas of research where ‘sense making’ had been used most frequently. The most dominant area of use was ‘strategy’ and ‘organisational change’, which is highly relevant to this study on ‘strategy translation’ as it shows that ‘strategy’ and ‘sense’ are linked.

When individuals speak of 'sense making', they speak about reality as an ongoing accomplishment that takes place when people make retrospective sense of the situations in which they find themselves and their creations (Jones, Melis, Gaia & Aresu, 2017; Weick, 1995). Research conducted by McKinsey & Company in 2014 (Birshan *et al.*, 2014) showed that in the preceding five years, companies were developing what can only be called, by their *own admission*, 'substandard strategies' which means (given the five-year timeframe) that the ability to see and identify gaps in personal 'strategy making' does not necessarily enforce *action* or change ahead of implementation. One of the key characteristics of 'sense making' as described by Weick (1995), is that *sense making is enactive of sensible environments*. This means that 'sense making' involves *interpretation in conjunction with action* (Weick, 1995; Thomas, Clark & Gioia, 1993). That is, it can be determined whether or not 'sense making' has occurred by the *actions taken* following 'sense making'. Kezar (2012), further confirms this by highlighting that, if stories have an organisational function, it is to allow individuals to enact scenarios that can explain and account for the dilemmas of daily living.

Each organisation has its own language and symbols ('culture') and these all have an impact on sense making (Karpavičius, 2014; Astley & Zammuto, 1992; Weick, 1995). It is critical that all organisation members, both on an executive and non-executive level, understand any intended change in a way that "makes sense" to them (Balogun & Johnson, 2016). Tasked with the responsibility of defining a revised conception of the organisation, the executives must first develop a sense of the organisation's internal and external environments through the process of sense making (Gioia & Chitpeddi, 1991; Bajwa, Waseem & Ahsan, 2020). Sense making is a motivated continual effort to understand connections to understand their paths and act efficiently (Balogun *et al.*, 2014). Owing to its complexity, the likelihood of misunderstanding sense making and falling victim to the 'sense-making trap' is high. The 'sense-making trap' is that one might make the assumption that sense making is *an individual act* like a single 'sense maker'.

Any one sense maker is "a parliament of selves." This suggests that identities are made up of the process of interaction (Weick, 1995). This 'trap' exists similarly in the strategy translation arena, where two assumptions exist. The *first* being that strategies are formed by a small number of individuals while the reality is that strategies evolve,

to a great degree, inside organisations (Ericson, 2001). The *second* assumption could be that: once handed down from top management, the strategy message cannot flow back up the management hierarchy, thus contributing to the gap in implementation (Miranda, Tereso & Teixeira, 2021; Mijovic-Prelec & Prelec, 2010).

Members of the organisation on all levels should be treated as active *translators* of the strategies planned at top-management level, as they play an operational and important role in strategic change processes in the same way that strategic plans and visions do (Park & Mezias, 2005; Paroutis & Heracleous, 2013). Activities dealing with strategy formulation cannot be separated from strategy implementation and vice versa (Ericson, 2001). Sense making influences strategic-change implementation and outcomes by generating acceptance or rejection of the strategy across the organisation (Lundgren-Henriksson & Kock, 2016; Balogun & Johnson, 2016). The conceptualisation of 'sense' in the present-day business environment, on a worldwide scale, can be considered as abstract and complex. There can thus be major differences in how managers make sense of the same environment (Moore, 2009).

Individuals have limited data-processing capabilities, that are used to process great amounts of ambiguous data. To make sense, managers rely on simplified representations or mental models (Barr, Stimpert & Huff, 1992). Constant, consistent and deliberate reflection on how sense happens in organisations is necessary across the various levels of management because strategy is something that rests on unique insights (Bogner & Barr, 2000; Porter 1996).

These unique insights identified by Porter (1996) are not linked only to knowledge or experience but also to sense making. There are many factors that may affect the way in which information is absorbed. The use of personal mental models, for instance, allows individuals to make sense of their environment and act within it. Managers on different levels attempt to escape bounded rationality by developing cognitive simplifications in the form of mental models (Simon, 1979, 1991; Van Zandt, 2001; Tan *et al.*, 2020). These selectively reduce information processed (Pandza & Thorpe, 2009). That said, it is important to consider that, given cognitive limitations, mental models may be, or may become, inaccurate. As the environment changes, so the inaccuracy may increase (Barr *et al.*, 1992).

It is thus crucial that management research focuses on the way individuals create meaning and make sense of their organisational life, as this can enhance their knowledge of strategy and strategic change (Ericson, 2001). While the process of creating meaning may seem like a somewhat systematic, straightforward and easily implementable process, I must stress that in practise, problems do not always present themselves as given and are often multifaceted, confusing, irrational and non-systematic. Weick (1995:9) fittingly indicates that, at times “A practitioner needs to make sense of an uncertain situation that initially makes no sense.”

While intricate, sense making can assist in minimising ambiguity in strategy, in that it serves several functions (Klein, Moon & Hoffman, 2006:88-91):

1. it satisfies the drive to comprehend;
2. it helps us test and improve the plausibility of our explanations and to explain apparent anomalies;
3. it aids in clarifying the path even though it does not make it transparent;
4. it guides in anticipation of the future, and
5. it directs in the exploration of information

In attempting to demystify strategy as well as the potential gaps that lie in understanding strategy implementation, one must acknowledge and appreciate the influence of *sense making on strategy*.

In linking strategy to sense, the concept of strategic sense making was introduced by Gioia (1993:153-156). He subsequently defined it as an

uncertainty reducing cognitive process of initial sense making that activates purposeful action and retrospective sense making that enables managers to understand the appropriateness and usefulness of the development of novel knowledge and its fit into business opportunities.

This definition was later simplified and expanded upon by Rouleau and Balogun (2011:956) who stated that strategic sense making is accomplished through the ability of managers to craft and share a message by referring to an often-complex pattern of underlying knowledge. They go on to point out that strategic sense making does not exist just in cognitive structures or in routines and systems, but that it is constituted and reconstituted in ongoing discursive activities of managers (implementation).

Gioia (1993: 240-246) notes that the process of strategic sense making consists of **four** main elements:

1. scanning;
2. interpretation;
3. action, and
4. performance.

These phases of strategic sense making can be inextricably linked to organisation performance. These four elements will inform the proposed strategy translation framework as well as help build upon the development of the sense reception concept. To guide our thinking and understanding, there is a need to define clearly the concepts that guide this study.

While often used synonymously, 'understanding' and 'interpretation' are not equivalent to 'sense making'. Similarities might exist between these concepts but there are several distinguishing factors that set 'sense making' apart from 'understanding' and 'interpretation'. Weick (1995) avers that 'interpretation' is a component of sense making but that, while 'interpretation is not irrelevant', 'sense making' matters because a mistake in sense making could have dire consequences. The *key distinction* is that 'sense making' is about the ways people generate what they *interpret*. It is pivotal that the distinction between 'sense making' and 'interpretation' be understood. Daft and Weick (1984:286) describe "interpretation" as "data given meaning". They go on to define "organisational interpretation" as the "process of translating events and developing shared understanding and conceptual schemes among members of upper management." They indicated that while interpretation gives meaning to data, it occurs before organisational learning and action (Jabbar & Wali, 2021). The understanding of sense making as an initiator of *action* makes *strategic change* in a firm possible. The initial sense making is thus seen as a cognitive process.

Sense making is best described by Weick (1995:17-55) as having **seven** specific properties:

- **Firstly**, sense making is *ground in identity construction*, which refers to 'who you are'.
- **Secondly**, based on the fact that one can make sense of lived experiences, it is *a retrospective process*.
- **Thirdly**, sense making is linked to what people do and it is therefore *enactive of sensible environments*.
- In the **fourth** and **fifth** instance it is a *social and ongoing process*.
- The **sixth** element addresses the sources individuals draw from when making sense and these are signals and cues.
- **Finally**, due its social nature as well as the human stimulus, *sense making is driven by plausibility rather than accuracy*.

Consequently, it can be said that sense making plays an essential role in establishing how people give meaning and create understanding for themselves and for others.

2.4 WHY SENSE GIVING AND MEANING MAKING MATTER FOR STRATEGISING

Following on 'sense making' is the concept of 'sense giving' which links the individual with a collective level of cognition (Pandza & Thorpe, 2009:123). This collective level of cognition is critical for strategising. Strategising, which can be seen as the 'doing of strategy', involves the construction of the flow of activity through the actions and interactions of multiple actors and their interactions (Jarzabkowski, Balogun & Seidl, 2007:6). A leader or a manager has a 'sense-giving role'. He or she is representative of an 'embodied escape' from what others might otherwise consider incomprehensible, chaotic or indifferent (Thayer, 1988:250). To influence those around them to adopt their point of view, skilled managers are able to use the knowledge of their organisational context and that of their colleagues / sub-ordinates / seniors (Rouleau & Balogun, 2011; Booyesen & Nkomo, 2010).

'Meaning' is constructed by an understanding of how things, people and concepts were, are or should be (human discursive practice) and is not a closed or fixed process but one in which all these social elements are addressed (Pujante & Morales-López, 2013). Lofland, Lofland, Charmaz and Preissie (1996) opined that humans

have a natural inclination to understand and make meaning of their lives and experiences. Often associated with 'sense giving' is the concept of 'meaning making'. When 'giving sense', a manager not only influences the sense making of his or her sub-ordinates but also assists in creating *meaning* for them.

'Meaning making' can be explained in various ways in practice. When looking, for instance, at *meaning as is represented in artwork*, we find that art can mean different things to different individuals. While it is often open to personal interpretation, a painter of a specific piece of art gives 'meaning' to those who look at his artwork. He gives them a different way of 'seeing'. This is how meaning is created by the sense giver within various settings. Taylor (1983:1165) and Park (2010:260) describe 'meaning' as an effort to understand the event. They state that 'meaning' is also reflected in the answer to the question: "What does my life mean now?"

Similarly, in organisations, one might ask, 'What does this mean for me and my job?' When making sense out of vast or ambiguous data, there is a need to *simplify* the data to make sense of it. Individuals will develop mental models to do so. 'Sense giving' contributes to the construction of these mental models and these models constitute the framework of organisational rationalities and belief systems (Hill & Levenhagen, 1995; Smith *et al.*, 2010). Müller (2020:321) brings forth the concept of "framing" which he describes as the "Process by which issues, decisions, or events acquire different meanings from different perspectives". He draws attention to the fact that because sense making is context driven, meaning can vary based on different perceptions.

Experience generally guides thinking and decision making and so *sense giving* becomes critical for *knowledge transfer*. In giving sense, the top-management team goes through an interpretative process to clarify the present ambiguity, first for themselves. Thereafter a process of 'sense giving' takes place wherein the strategy or 'vision' of the organisation is disseminated to stakeholders and constituents (Corvellec & Risberg, 2007; Gioia & Chittipeddi, 1991).

'Sense giving' is usually thought of as an exercise of verbal language. But, if one considers 'language' in a broader sense, then 'sense giving' is amenable to various types of media, including symbols and gestures. 'Sense giving', therefore, pertains to

what managers do as well as what they say (Smith *et al.*, 2010). There are various ways in which managers can give sense... one way being through symbols. Symbols and symbolic action are typically used to communicate that an interpretative scheme is no longer appropriate. These symbolic actions reflect instability in its members' understandings of the organisation or its strategy and demand to create and make new sense is thus born (Gioia & Chittipeddi, 1991; Bajwa *et al.*, 2020). Similarly, story-telling can also be used as a means to deliver new *meaning* for individuals.

Stories and meaning making are closely associated, with people often using story-telling as a tool to create meaning. Stories can be considered as recursive, reciprocal and interactive sense-making and sense-giving vehicles that shape meanings (Humphreys, Ucbasaran & Lockett, 2012; Weick, 2005). Maitlis and Lawrence (2007:7) reason that sense giving has profound consequences which affect strategic decision making in organisations. Gioia and Chittipeddi (1991:443) indicate that sense giving occurs in *four* stages, namely:

1. sense-making effort by the CEO;
2. sense-giving effort by the CEO, wherein he/she attempts to communicate the vision to stakeholders and constituencies ('signalling');
3. sense-making effort by the stakeholders – attempting to make sense of the vision proposed to them and they revise their understanding ('re-visioning'); and
4. sense-giving effort by stakeholders, wherein they respond to the proposed vision and attempt to influence its realised form.

Sense giving creates an environment of 'inclusivity' within organisations because it not only reflects the manager's sense-making capabilities, but also creates a virtual space for shared meaning to take place (Maitlis & Lawrence, 2007; Jones, Ravid & Rafaeli, 2004; Smit, Neubauer & Fuchsberger, 2021). This is important because it brings into focus the shared understanding and meaning among management and sub-ordinates. Owing to the varying levels of expertise and tacit knowledge associated with a certain management level, management on the respective levels tends to think and make sense in different ways (Chu, 2021; Spence, 2002).

The concept of *tacit knowledge* covers knowledge that is unarticulated and tied to the senses, physical experiences, intuition or implicit rules of thumb (Nonaka &

von Krogh, 2009). Middle-management's thinking would, for instance, be characterised as 'inductive', as opposed to that of top management, which is often seen as 'deductive', and as such there may exist a 'cognitive divide' (Regnér, 2003). Unless attended to, this cognitive divide could lead to a break in the translation of a strategy, thus hampering delivery and reception of the correct strategy among the various levels of management (Rostan & Rostan, 2021).

When 'giving sense' there is a need to *translate what you mean* to those receiving the message. Boswell *et al.* (2006:499-500) opine that, in *translating* strategic goals into an enacted strategy, the basic premise is that the development of a 'line-of-sight' among employees about what the strategy involves and how to contribute, is required. 'Strategy translation' as well as 'sense giving' further involve elements of knowledge conversion, which is represented by the interaction between *explicit knowledge* (that which is uttered and captured in drawings and writing), and *tacit knowledge* (that which is more internal and difficult to transfer by means of drawing, writing or verbalising) (Nonaka & von Krogh, 2009).

Roleau (2005:1425) avers that "translation involves telling people the stories they want to hear and involves two actions":

1. **selection** of elements that are used to translate the message, and
2. **connecting** the material and broad symbols belonging to the language of the other person (receiver) who is used to transmit the message.

This suggests that when 'giving' or 'sharing' sense, the relevance of the elements of 'sense' (such as symbols, language symbols, signals, metaphors, myths, paradigms, paradoxes, for example), cannot be disregarded as they are basic to sense making (Gioia, Thomas, Clark & Chittipeddi, 1994; Belogolovsky & Bamberger, 2014) and they all make for a 'good story' (Stevens, 2013). 'Story-telling' is regarded as valuable for the adoption of strategic plans as well as the communication of strategic intent throughout the organisation as it makes the content of the strategy more relatable and can improve the buy-in among employees (Küpers *et al.*, 2012).

When *presenting an idea*, the use of stories could be a way of *providing answers* to questions that might otherwise not be easily answered (Pye, 1995). When telling people about a new strategy, each manager has a unique way of 'telling' his / story.

Each story may present a plausible and credible explanation in line with the manager's tacit knowledge and experience (Rouleau, 2005:1425).

Rouleau (2005:1433) asserts that in strategic sense-making and sense-giving processes, various authors (Gioia & Chittipeddi, 1991; Gioia & Thomas, 1996; Hill & Levenhagen, 1995) indicate that there are **three** orders of explanation:

1. a **first-order** explanation aims to reveal how fundamental features of a strategic plan are defined in the early phases of change;
2. a **second-order** explanation attempts to discern a deeper understanding of these processes by looking at evolving patterns of narratives, stories and discourses presented to various stakeholders by the top-management team, and
3. the **third-order** explanation, which is relevant to this study, looks at how strategic sense making and sense giving processes are constituted through communication and action in daily routines and conversations. When one translates strategy, as previously alluded to, it goes beyond simply communicating the strategy to the parties involved.

Translation can be related to 'knowledge conversion', with the key areas of interest in, **firstly**, the conversion of knowledge (the flow of knowledge from one individual to another) and, **secondly**, how the converted knowledge is used once received. The enactment of converted knowledge or a translated strategy could be linked to whether or not a strategy is ultimately implemented effectively.

Strategy is by definition ambiguous (de Wit, 2019). Organisations require strategy to function, which means ambiguity often exists within organisations. Ambiguity is a trigger for sense making (Weick, 1995) and can create an opportunity for new sense to be made. The CEO or executive team have an opportunity to build awareness (give sense) and generate support for his / her vision or preferred interpretative scheme, thus leading to another 'sense making' effort by the relevant parties (the receivers of sense) (Gioia & Chittipeddi, 1991). Because sense making is swift and retrospective in nature it is difficult to measure or observe it as it happens, meaning one will see the *results* of sense made rather than *how* it was made. What is generally seen is 'products' rather than 'process'. To lessen the frustration or confusion that may arise as a result of either ineffective translation or understanding, one needs to observe how people deal with prolonged puzzles that defy 'sense making'; these puzzles could

be represented as paradoxes, dilemmas and inconceivable events (Weick, 1995; Bawden & Robinson, 2008).

In attempting to further reduce ambiguity and uncertainty that might come about when translating a strategy, it is vital to consider a 'sense' that exists as a *prelude* to 'sense giving,' known as 'sense breaking,' which will be further discussed and elaborated upon in Chapter 3 (Maitlis & Christianson, 2014).

'Sense breaking' plays a vital role in both 'sense making' and 'meaning making' as it focuses on *how* organisational members must first *break down sense* (in their own minds) to give sense (to others). 'Sense breaking' involves the 'destruction or breaking down of meaning' (Pratt, 2000:464) and can motivate people to re-consider the sense that they have already made, to question their underlying assumptions, and to re-examine their course of action (Maitlis & Christianson, 2014; Kaffka, Singaram, Kraaijenbrink & Groen, 2013).

In line with 'sense breaking', Weick *et al.* (2005) denote that 'sense making' is about noticing and bracketing, which can also be a form of sense breaking. Noticing and bracketing of information is guided by mental models acquired during work, training and life experiences. It becomes apparent that the various senses are interrelated and, to some extent, interdependent. Giuliani (2016) aptly summarises the different senses by stating that 'sense making' regards the identification of justifications of a specific phenomenon; 'sense giving' regards the diffusion of a justification among members of an organisation, while 'sense breaking' is related to the adoption of new justification.

2.5 UNDERSTANDING THE ELEMENTS OF THE PROPOSED HIERACHICAL SENSING LOOP

Based on the literature, this study proposes a 'sensing' framework (**Figure 2.1**) which is referred to as the "hierarchical sensing loop" of strategy translation. The framework attempts to rationalise multi-level sense comprehension, strategy translation and, ultimately, effective implementation. The dynamics of 'sense' are exposted through offering a description of how 'hierarchical sensing' can be used to translate strategy within an organisation.

The 'hierarchical sensing loop' begins by looking at and addressing how 'sense making' is said to occur at top-management level, where top managers (executives) have, *firstly*, to make sense of signals, trends and information from the external environment to understand the situation. The top managers would, typically, then develop or formulate a strategy (either by themselves or as part of a team). Once sense has been made, top management is then tasked with the '*giving of sense*' ('sense giving' has to then take place). It is during the 'sense-giving process' that top management has to create meaning for the middle managers (typically) and ideally begin the 'translation of strategy.'

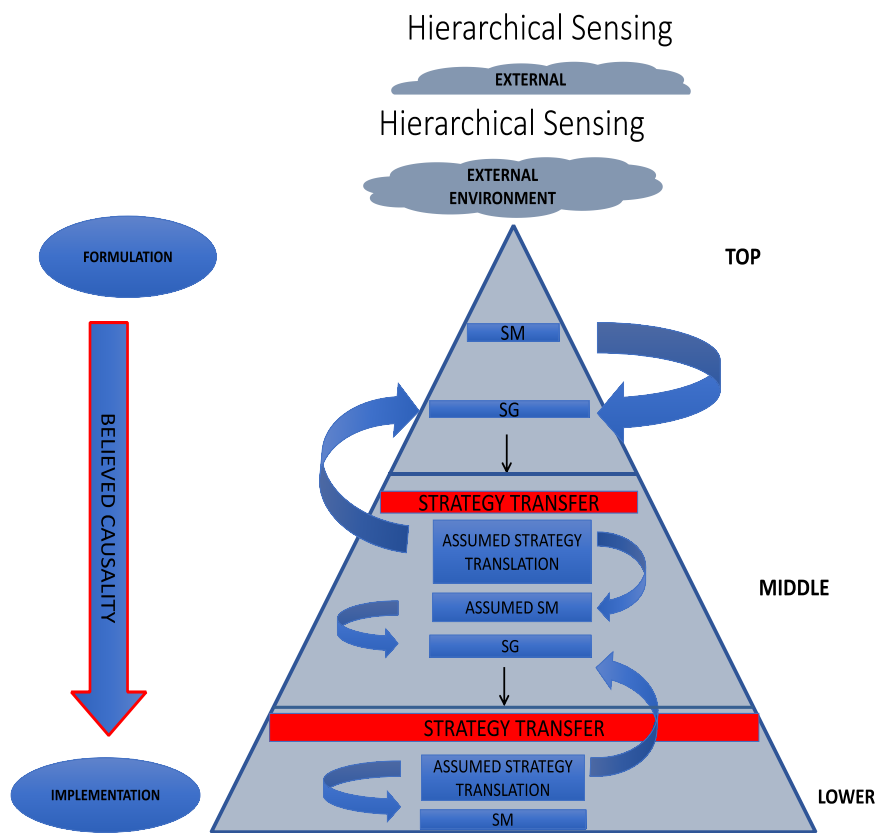


Figure 2.1: Hierarchical sensing loop based on literature

Source: Own compilation

What is seen in practice, however, is that strategy is not always 'translated' but rather merely 'transferred'. Where "transfer" is technically seen, according to "Merriam-Webster's Dictionary" (11th ed., sv. "transfer" and sv. "translation"), as the act whereby one 'conveys from one person, place, or situation to another' and 'translation'

is seen as 'a rendering from one language into another'. These definitions highlight, to general understanding, the differences between the two acts: in 'transfer', there is a movement of information from one subject to another. In 'translation', the information as well as the meaning thereof changes from one subject to another.

Unfortunately, there is often an assumption by subjects that a 'strategy message transferred' is a 'strategy message translated' which I infer may lead, not only, to a gap in understanding of a strategy but a gap in the ultimate implementation of the said strategy.

The logical step following the 'transfer' or 'translation' of the strategy message is the 'reception' of the message. The middle managers receive the strategy given to them by the top managers ('sense reception' is assumed to take place). They then have to make sense of what has been communicated down ('sense making' once again takes place) and then they have to relay to the top managers (in the event of confusion) whether or not they comprehend and can make sense of what was handed down (the loop). The reason for this 'back-and-forth' is to permit any of the managers to expose whether or not there are any potential 'inconsistencies' in perception, and to allow for 'clarification' and 'reorientation' (Boswell *et al.*, 2006; Koniger & Janowitz, 1995). Once this has been done, the middle managers need to 'translate' (often rather 'transfer') the strategy downwards and 'give sense' to the lower-level employees. The assumption is that 'sense reception' will then take place at the lower level as a result of 'accurate sense' given from middle managers (Kamel & Fatima, 2019; Sharma & Good, 2013; Savolainen, 2007).

The same 'loop' process needs to take place, suggesting that the lower levels need to 'receive sense', 'make sense' of what was received and then relay back to the middle managers whether or not the 'translation of sense' was effective. From a theoretical perspective, the hierarchical sensing loop takes into consideration the obvious theories of sense making and sense giving as well as the [to be introduced] concept of 'sense reception'.

From a literature perspective, Gioia and Chittipeddi (1991: 433-448) refer to what is known as a 'feedback loop' in sense, wherein they emphasise that, when looking at 'sensing' in the process of translation of a strategy, it begins with the creation of a

‘viable interpretation’ of a ‘new reality’ by top management (‘sense making’). ‘Sense giving’ then follows, whereby a workable interpretation is presented to those who would be affected by the actions taken by top management (‘stakeholders’, and ‘lower levels of management’). The *targets* (‘sense receivers’) of the ‘top-management’s sense-giving attempts’ would have to make their ‘own sense’ and, most importantly, they would attempt to ‘act’ upon their revised *understanding* of, or *preferences* of the new organisational reality back to the top-management team (Barta & Barwise, 2017). As illustrated in **Figure 2.1**, ‘sense making’ begins with the interpretation of external information by top management.

It is key to note that there is a great deal of information that management comes into contact with, not all of which is necessarily relevant and may lead to ‘overload’ of information (Bawden & Robinson, 2008; Beaudoin, 2008). ‘Sense-making’ activities deduce that a strategist might pay attention to some issues while ignoring those they deem irrelevant (Weick, 1979; Gioia & Chittipeddi, 1991). Veel (2011:316) highlights that the overriding problem, when dealing with ‘overload in information’, lies with whether or not managers are able to ‘identify *significant* information’. Weick (1995) indicates that sense making is focused on and extracted by cues. However, until top management notices and interprets raw signals or cues from the environment, their causal relationship with the firm cannot be addressed (Huff, 1990 in Nadkarni & Barr, 2008; Bergh & Gibbons, 2011). It is easy for one to miss valuable “weak signals” which are often hidden amid the “noise” due to the sheer “volume” of information available in the digital age (Zollman, Bergstrom & Huttegger, 2013; Bergh, Connelly, Ketchen & Shannon, 2014; Harrysson, Métayer & Hugo, 2014). The sentiments of Veel (2011) are further mirrored in stating that, while weak signals are everywhere, deciding when and where to keep the ‘antennae’ out is critical.

It thus becomes evident that, with strategy, it is important to know to which cues to pay attention because objects, messages and cues have multiple meanings and significance. Given their hierarchical positions, the managers on lower levels do not necessarily share the same level of consciousness of corporate strategy and, in turn, do not make sense in the same way as top managers (Bogner & Barr, 2000; Rouleau, 2005). When ‘translating the strategy’, management should, therefore, consider the ‘receivers of the strategy’ and, in so doing, be conscious – not only of their own ability to give sense, but of the cognitive abilities or limitations of the people having the

strategy translated to them. Attention ought to be directed at those for whom the strategy is being translated because organisational change characteristically implies that learning must take place (Jabbar & Wali, 2021; Sims, Huxham & Beech, 2009; Mathews, Rodgers & Youngs, 2017).

Organisational actions are shaped by *individual actions*. These actions could then lead to environmental responses. When these environmental responses alter individual representations and lead to improved individual and organisational action, the learning cycle (effective conversion) would then be complete (Nonaka & von Krogh, 2009). Individuals might, for instance, hold tacit beliefs about objects, events or relationships and these could hinder the capacity of individuals to act and thus inhibit groups from synchronising the individual action effectively (Edmonds, 1999). When converting knowledge, even in the form of strategy translation, various factors (such as the knowledge type, reasoning method and cognitive abilities of individuals) need to be considered.

Despite this study, being multi-hierarchical, its main interest lies with the *recipients of sense* (followers and implementers). For the purpose of this study, the followers and implementers are represented by middle- and lower-level managers. In reference to leadership, Kellerman (2007) highlights an important quality regarding followers: namely, that 'followers' are not all the same. In similar vein, 'recipients' are not all the same. Thus, the need for awareness of the receivers and their abilities is critical.

'Followership' goes beyond skills and knowledge of employees. 'Perception' plays a crucial role in whether or not plans are carried out.

As a leader, a strategist can be enabled or constrained by how others see them, for instance, are they seen as 'heroes' or 'villains' (Balogun, Jacobs, Jarzabkowski, Mantere & Vaara, 2014). It is advisable for managers to understand the kind of 'followers' (receivers) within their team, as well as their skills and limitations. This should precede how the managers choose to lead their team and will, in turn, affect how the managers translate the strategy to their team. In assessing the cognisance of employees, it should be eminent that the 'tacit knowledge' and 'explicit knowledge' of individuals are mutually complimentary (Pirolli & Card, 2005). They interact with each other in creative activities by individuals and groups (Nonaka & von Krogh,

2009). The aim is to build, through the continuum of 'explicit' to 'tacit' knowledge, onto the current 'explicit' knowledge and create strategists that embody 'tacit' knowledge.

'Knowledge' plays a significant role in how sense is made and in how people ultimately choose to act as it permits them to define, shape, prepare and learn how to solve problems (von Krogh, Ichijo & Nonaka, 2000). 'Knowledge' in this context does not refer to '*what people know*' but, rather, '*how they know what they know*'.

Nonaka and von Krogh (2009) highlight the differences between the two types of knowledge. '*Explicit knowledge*' has a universal character, which supports the capacity to act across contexts and is accessible through consciousness. Knowledge that is tied to the senses, tactile experiences, intuition, movement, skills, implicit rules of thumb and unspoken mental modes is '*tacit*'. Many actions taken when using tacit knowledge may be deliberate practices and can be done in the form of routines. '*Tacit knowledge*' is rooted in procedures, routines, actions, commitment, ideals, values and emotions (Nonaka, Umemato & Senoo, 1996). Feldman (2000) asserts that routines have an important role in change management and strategic change. So, for enhanced translation to take place, the knowledge levels and types of receivers should be considered by sense givers.

While effective *strategy implementation* can offer a great source of competitive advantage, attaining and benefiting from this advantage requires a complete organisational effort including the leadership and active participation of top-level, mid-level and lower-level managers (Tawse, Patrick & Vera, 2019). It appears critical that we understand how multi-level sensing among the various types of receivers takes place within organisations and how this influences strategy translation. By studying how various resources are utilised in routinised ways that form patterns, it may be possible to understand how a '*strategy-making activity*' (strategising) is conducted in organisations (Kaplan, 2011; Jarzabkowski *et al.*, 2007; Paredes, 2003).

The importance of the proposed 'feedback loop' is further highlighted by the findings of Kezar (2012) who indicates that, in the process of 'change management', 'sense making' and 'sense giving' are not just important at the beginning stages but throughout the *entire* strategy process (Maon & Swaen, 2009). The checking and re-checking of whether or not the information received is not important just for effective

strategy implementation but also for learning. Much of the learning in organisations takes place through the rehearsal and re-telling of stories (*strategic intention*) followed by the mental simulation of the practices (*enactments*) that have been heard within the stories (Sims *et al.*, 2009).

While my focus is on 'hierarchical sensing', the viewpoint of 'sense making' is that organisations should not be seen as 'fixed objective entities' that are defined plainly by organisational charts and management hierarchies, but rather as variable and multiple representations of reality (Alderman *et al.*, 2005).

Equally, when translating a strategy, it must be noted that it may not always be enough to tell or teach in a systematic manner but rather through the use of a story (Sims *et al.*, 2009).

2.6 POTENTIAL IMPLICATIONS OF THE PROPOSED SENSING FRAMEWORK

The proposed 'sensing framework' aims to provide a structured way for strategists to understand and translate sense. In their research on 'strategic alignment in firms', Schmidt and Brauer (2006:13-22) report that in literature on strategy, sense making and sense giving, it was confirmed that organisations engage in continual 'sense-making processes'. The issue, however, is that the 'sense-giving power' of the original corporate concept may diminish over time (Burgelman, 1996). This could mean that part of the reason strategy implementation fails may seem linked directly to the issue of 'sense in organisations', particularly the 'sense made', 'given' and any 'processes followed' to check whether or not 'reception' has taken place.

Jarzabkowski *et al.* (2007:5-27) postulate that previous research seems to have lost sight of the 'human being' in strategy. This study proposes that through the 'hierarchical sensing loop' we can consider the various tools, approaches or mechanisms used previously to address and study sense in strategy. As will be shown in **Section 3.5**, the framework aims to introduce a practical viewpoint on understanding sense in strategising and strategy translation in the 21st century, thus bringing back the sometimes forgotten 'human being' into strategising.

Boswell *et al.* (2006:499-505) highlight that effectively disseminating and implementing companywide strategic direction requires more networked-like designs, where managers 'receive- and transfer-information' through both functional and operational structures. This ensures the effective cascading of strategic objectives through the organisational hierarchy by top management (Zeps & Ribickis, 2015). Considering that 'sense reception' can advance 'strategy translation', I proceed by introducing and exploring the concept of 'sense reception' in **Chapter 3**.

2.7 CHAPTER SUMMARY

Chapter 2 concludes with proposing the 'hierarchical sensing loop' as an important cog in 'strategy translation'. While 'sense making' and 'sense giving' are well covered in the literature, 'sense reception' is not. **Chapter 3** explores 'sense reception' as a crucial component of 'strategy translation' and introduces a second framework, known as the 'strategy-translation interface framework'. In **Chapter 3** the concept of 'sense reception' is developed and broken down. The importance of 'sense reception' is established and its link to the various sense concepts as well as to 'strategy translation' is reflected upon.

CHAPTER 3: INTERROGATING SENSE RECEPTION

“I hear and I forget, I see and I remember. I do and I understand.”

— Chinese proverb

3.1 INTRODUCTION

Exploring ‘sense reception’ – an under-recognised core concept in this study – builds on its role as proposed in **Figure 2.1** on the ‘feedback loop involved in strategy translation’. This chapter endeavours to expand on all associated elements of sense reception and terminology that is used with it. People tend to ‘overestimate’ the value of information that confirms their cognitive beliefs and ‘underestimate’ or even disregard dis-confirming information, thus falling victim to ‘confirmation bias’ (Brady, Davies & Gann, 2005; Jonas, Schulz-Hardt, Frey & Thelen, 2001). It is thus imperative that we understand how sense is both ‘given’ and ‘received’ in translating a strategy. If the assumption is that “once sense is given, the work of the sense giver is done”, it can be detrimental to the *learning* of the one to whom ‘sense’ is given. People might think they are learning when they are, in fact, learning only *within the bounds* of a specific paradigm (Mitchell & Demir, 2021; Kieser & Koch, 2008).

Simon (1991) aptly points out that ‘internal learning’, which is the transmission of information from one organisational member or group of members to another, is an important concept to consider when it comes to ‘organisational learning’. He then highlights that *‘individual learning in organisations is a social, and not a solitary, phenomenon’*, thus confirming the importance of having shared understanding or ‘common sense’ when translating a strategy, which is the focus of this study. Consider the task of teaching a young child self-sufficiency. Upon hearing what they are told to do, they might:

1. hear and perhaps even
2. understand what you say, and
3. be able to do what you say at that particular point in time but
4. forget the instructions the next time they are faced with the same challenge.

'Demonstration' (action by the translator) then becomes key to them remembering what is required.

The study infers that 'proficiency' (independent enactment) is, however, reached only once they 'physically perform' or 'become involved' in the activity. 'Sense making' requires 'enactment' which, in the case of 'strategy execution', is signified once an employee 'actively actions the formulated strategy'. It is upon 'action' that a strategy takes on new meaning to them. With this in mind, the concept of 'sense reception' begins to take form and reflects the continued connection of the various senses when translating a message.

3.2 SENSE RECEPTION EXPLORED

The saying '*know your audience*' is especially relevant when attempting to understand 'sense reception'. When 'translating a strategy', it is important firstly to question whether or not the message has 'been delivered' in the 'right manner' and then, more importantly, whether or not it was received in the 'manner intended'. Sims *et al.* (2009) emphasise the significance of the 'receptiveness of the audience' in story-telling (within organisations). They indicate that a 'receiver's listening' is often influenced by their imagining how they will re-tell the story to others and how they will react. They may thus adjust the re-telling to the context to bring about change (Bryman, Stephens & Campo, 1996).

As indicated previously, I have yet to come across the academic definition of "sense reception" in extant literature. To introduce the discussion, I propose a working definition (subject to change) of 'sense reception' as:

The degree to which the 'cognitive maps' of the 'sense receivers' overlap with those of the 'sense givers' after translation.

Table 3.1 contains an extensive list of definitions of the *various concepts of sense* but, in summary, Giuliani (2016) differentiates between the various forms of sense. He asserts that 'sense making' is about understanding; 'sense giving' is about

influencing and ‘sense breaking’ is about ‘change’ and ‘destabilisation’. It is, therefore, inferred that ‘sense reception’ is about the enactment following the adoption of the translated sense. While there have been studies done on sense and the link of sense to strategy, ‘sense reception’ is an area of sense literature that currently appears to be under-emphasised and under-researched.

Figure 3.1 is a general sense reception framework which illustrates the overlap between the senses post-translation as suggested in the definition.

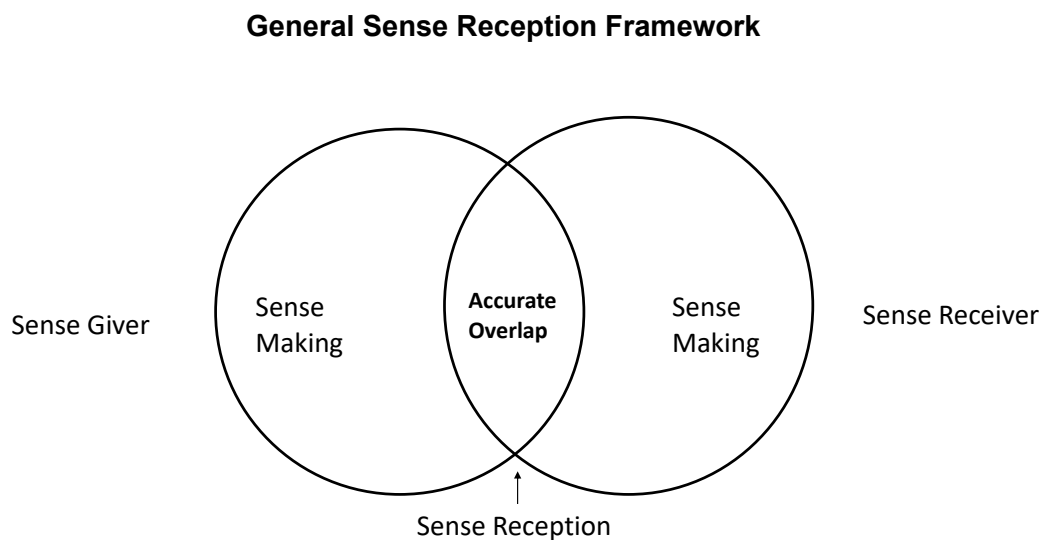


Figure 3.1: General sense reception framework supporting its own definition

Source: Own compilation.

In reference to audience receptiveness, several authors (Clarke, Pruyne & Hodgkinson, 2006; Mills & Weatherbee, 2006) refer to ‘sense taking’ and indicate that; when listening to a story, the audience generally hears whatever aspects they are receptive to (Sims *et al.*, 2009). This study proposes that, while relevant to sense and strategy, ‘sense taking’ is different from ‘sense reception’. One can ‘take’ sense without any real cognition or understanding of what they are taking. Individuals may just do what they are told to do without knowing why they do it and without any personal engagement which, as research indicates (März & Kelchtermans, 2013; Boswell *et al.*, 2006), may be counter-productive.

The key *difference* between 'sense taking' and 'sense reception' is that 'sense reception' requires the 'receiver' to make 'sense' of what he / her has been given. Sims *et al.* (2009) highlight that 'sense taken' is not necessarily 'sense made'. The degree of 'overlap in sense and enactment' is based on one's own sense (not made in action). Through enactment, individuals produce structures, constraints and opportunities that might not have existed before they 'took action' (Weick, 1988).

Thus, in comparison with sense taking, 'sense reception' can be seen as both 'ownership-' and 'enactment-dependent', which then leads to engagement with the set strategy. From this distinction it appears clear that a need for a deeper understanding of 'sense reception' exists. Managers (as sense givers) need to know whether or not the translated strategy is actually 'received' as it was intended because, what is plausible for one group, may prove implausible for another group, such as sub-ordinates or employees (Weick *et al.*, 2005). For a strategy to become 'embedded' in an organisation, there is a need for those who 'hear' sense (receivers) to become 'participants' (Pretorius, 2016). Without resulting 'action', 'cognition' appears limited.

'*Action follows cognition and focuses cognition*' (Weick, 1988). My interpretation is that 'sense reception' means that individuals can interpret and actually 'use' the sense given. 'Sense taking', in contrast, may mean that there is no real engagement but rather an organisation of passive 'followers' that complies with instructions. In attempting to attain strategic objectives, researchers have observed that the organisational view needs to go beyond simply finding a match between individual and organisational characteristics and the focus should be driven towards the perceptions of 'congruence' (Boswell *et al.*, 2006). When people face an unsettling difference, be it in understanding, perception or making sense, that difference translates into questions such as: "**Who** are they?", "**What** are they doing?", "**What** matters?" and "**Why** does it matter?" (Weick *et al.*, 2005). The concept of 'cognitive maps' (as applied in the working definition) as a proportionate influencing factor is thus key in this investigation of 'sense reception in strategy translation'.

While the study has pointed out the 'communication blame' that appears incorrectly attributed as 'causal to strategy implementation failure', cognisance should be taken of the fact that, because communication is a central component of sense making and organising, one should never disregard the importance of communication in strategy translation (Weick, 1995; Weick *et al.*, 2005). The critical issue to consider in strategy

translation is 'how' executives in organisations 'translate their strategy' and whether or not that translation is 'effectively received' (Cen & Cai, 2014). Pretorius (2016:9) proposed that to improve 'strategy embeddedness', it is important to change the strategy message. Contrary to what may be assumed, it has been found that change lies not only with the 'sense giver' but with ensuring reception of [=by] those to whom 'sense is given'.

Thus, top management can benefit by considering the receiver's characteristics in structuring the 'translation of a strategy'. Weick (2010) states that language is a central issue in 'sense making' and that 'sense making' is *actually selective vocabulary*. I propose that it is important not only to change the strategy message, but it is vital to observe the language and channels followed in the delivery of the strategy message. While effective as a translation tool, it bears mentioning that, even in storytelling, 'sense' always comes into effect. People will often absorb only that information they can use. Because there are multiple role players or a 'parliament of selves' (Weick, 1995) in 'sense making', when a story is being told, the receivers or audience will often retain '*snippets of the story*', which could later be reconstituted by the listener for their own purposes (Sims *et al.*, 2009). This brings forward the relevance for a '*feedback loop in sense and strategy*'.

Everse (2011) concluded that there are eight methods that managers or executives can use effectively to communicate their strategy, that could ultimately influence how the strategy is perceived and how employees act once they understand it. These include:

1. keeping the message simple, but deep in meaning;
2. building behaviour based on market and customer insights;
3. using the discipline of a framework;
4. thinking beyond the typical CEO-delivered message, suggesting we need not only consider the top-down approach;
5. putting on your "real person" hat;
6. telling a story when delivering your strategy;
7. using 21st century media and be unexpected and,
8. making the necessary investment, be it monetary, time, method, or resources.

These eight 'delivery methods' could be important and useful considerations, provided they are actually linked to 'effective reception'. From the eight, I noted that some can be considered as being *endogenous* (within the receiver's control) and others can be *exogenous* (outside the receiver's control). These eight methods are worth considering as they could also inform how people 'draw meaning' from the sense received. The way the 'story' is transferred matters, as it guides actions and influences others through persuasion or rhetoric.

Furthermore, inferences can be drawn from stories to gain insight into the nature, values and goals of individuals and organisations (Singer, 2004). When attempting to *influence change*, the *method of delivery* is crucial because, unless it is made *meaningful* to them and they can *connect to change*, it is often difficult for individuals to engage in the 'change process' (Gioia & Chittipeddi, 1991; Kezar, 2012).

3.3 CONTEXTUALISING SENSE RECEPTION IN STRATEGY TRANSLATION

'Sense reception' appears to have two components. The **first**, and seemingly obvious one, has to do with communication (which has been cited as a reason for 'implementation failure') wherein the strategy is merely transferred between levels of management. This component has its roots in *explicit communication transfer*. During this process, the message moves from one individual to another, and it follows that the 'sense giver' must be *deliberate* in creating meaning for the other person (Park, 2010; Mazloumi, Kumashiro, Izumi & Higuchi, 2008). This is because, while the message is delivered, it may seem clear and unambiguous to the 'sense giver' but it may prove ineffective if given in the form of an 'instruction' rather than a 'lesson'.

In this instance, for example, 'sense breaking' may not even happen (where the strategy formulator challenges current notions and beliefs before introducing the new concept or the new strategy) before 'sense giving' is attempted, thus leading to 'unconscious resistance' as people may hold preconceived ideas and beliefs. The message communicated is *delivered but the reception* of that message may be non-existent as there was *no translation of the message*. More specific to strategy, the 'strategy' may be 'communicated' (transferred) to the relevant parties but without 'reception'. Consider a situation wherein an individual receives a telephone call. The person on the other side of the line says something in a language in which the

recipient is only slightly fluent. The message may be delivered, meaning the person receiving the message hears, and has some understanding of the message. They then try to make sense of it and hand it on ('attempted sense giving') to the next person.

While the message was clear in that the recipient heard it, they may not fully understand or make sense of it unless it is 'translated' properly to them. This suggests that, while they were able to hear and perhaps take in the message, no 'reception' took place. The recipient, therefore, 'hears' but does not 'comprehend' and, as a result, cannot really 'interpret', 'accept', 'make sense of', or 'act' on the information transferred. As shrewdly observed by Sims *et al.* (2009), in situations such as these, sense taken from specific material, be it verbal or written, is not necessarily sense made.

**Thus, *sense taken* in this case means:
*Information has been transferred (communicated) but not translated
(conversion from communicated information) to a message.***

The **second** component focuses more on what is called 'implicit translation'. This goes beyond merely '*transferring a strategy*' and '*focuses on translation*'. Strategy is *ambiguous* by nature (Abdallah & Langley, 2014). It thus becomes paramount that the 'sense giver' translates clearly or interprets the strategy for the receiver. Contrary to 'explicit translation mechanisms' used to transfer or create meaning for the other person, additional 'meaning-making coping strategies' exist when 'implicit translation' takes place. Here, the message is transformed and takes on a 'different connotation' for the recipient. Before 'sense giving' is attempted, the recipient's thinking or beliefs will have been challenged in the form of 'sense breaking' and, later, 'meaning making'.

'Sense-breaking' actions, however, take place in the form of questioning, reframing, and redirecting (Giuliani, 2016). Pratt (2000) asserts that meaning is often created through 'sense breaking' and that when one questions: '*Who they are?*' and, when their sense of self is challenged, they are going through a process of 'sense breaking'. 'Sense breaking' fulfils a purpose of disrupting an individual's sense of self to create

a meaning void (in the 'sense receiver') that must be filled (by the 'sense giver'). What would then follow would be 'sense reception', which can be seen as conditions required to improve the ability of the recipient's sense overlap with that of the sense giver.

Before the discussion of the 'sense reception elements', there is a need to summarise the selected definitions of the various sense concepts. **Table 3.1** provides definitions of the other sense concepts and that of strategy translation relevant to this study.

Table 3.1: Definition of key concepts

Sense Concept	Definition	References
Sense Making	<p>Sense making is understood as a process that is:</p> <ul style="list-style-type: none"> (1) grounded in identity construction, (2) retrospective, (3) enactive of sensible environments, (4) social, (5) ongoing, (6) focused on and by extracted cues, and (7) driven by plausibility rather than accuracy. 	Weick (1995)
	<p>A process of assigning meaning to events in the environment, by applying stored knowledge, experience, values, and beliefs to new situations in an effort to understand them.</p>	Giuliani (2016)
	<p>The process through which individuals work to understand novel, unexpected, or confusing events.</p>	Maitlis & Christianson (2014)
	<p>Sense making refers to how people notice, select and interpret ideas in their environment and how they enact them, so as to be rendered meaningful.</p>	Rom (2019) Weick (2001) Weick (1995) Porac, Thomas & Baden-Fuller (1989)

Sense Concept	Definition	References
Sense Giving	Sense giving is concerned with managers' attempts to influence the outcome, to communicate their thoughts about the change to others, and to gain sub-ordinates' support.	Rouleau (2005)
	Sense giving is a related process by which individuals attempt to influence the sense making of others.	Gioia & Chittipeddi (1991) Maitlis & Lawrence (2007)
	Also termed external sense making , which is the process by which internal actors try to effect the understanding and actions of crucial external actors.	Gioia <i>et al.</i> (1994)
	Sense giving reinforces prominent reputational beliefs by proposing new meaning to continue existing narratives.	Aula & Mantere (2012)
	Acts of sense giving are founded on the notion that the central purpose of organisational communication is to maintain coherence among beliefs within the organisation and among stakeholders.	Maitlis & Lawrence (2007)
	Sense giving can be examined within the creation of an organisational development initiative, in which leaders constructed opportunities 'in ways that appealed to the values of the receivers.'	Bartunek, Krim, Necochea and Humphries (1999)

Sense Concept	Definition	References
Sense Breaking	It involves the 'destruction or breaking down of existing meaning'.	Pratt (2000:464)
	An activity whereby a person's process of sense making is disrupted by contradictory evidence. It is concerned with breaks in the scanning, interpretation, and learning dynamics of the sense-making process.	Giuliani (2016)
Meaning Making	Process through which individuals attempt to reduce the discrepancy between appraised and global meaning and restore a sense of the world as meaningful and their own lives as worthwhile.	Park (2010)
	A person draws meaning from, or gives meaning to, events and experiences. That is, experiencing starts to make sense as the person performs his or her psychological functioning of translating it into how he or she thinks and feels.	Krauss (2005)
	Meaning making is accomplished (and evidenced) by the composition of interpretations of a dynamically changing context. Interpretations are enacted in human cognitive and social activity.	Suthers (2006)

Sense Concept	Definition	References
Sense Taking	Sense taking is not only a reflection of sense giving. It is based on successful influence in some or several of the identity layers. The understanding of how others provide meaning for a focal actor; the successful influence of others.	Huemer (2012)
	Meaning interpreting or evaluating the sense-making narratives of others.	Rom (2019)
Strategy Translation / Translation	Translation is an activity, allegorising such as historicising or punning that gives form to the approximation.	Weick (1995)
	Translation as a product is the starting point for a researcher with an interest in describing the very shape of the actual target texts, or their function, position, status within the culture in which they exist.	Shreve, Schäffner, Danks and Griffin (1993)
Interpretation equated with Translation	A rendering in which one word is explained by another. It is multidirectional and points towards text which needs to be interpreted and an audience presumed to need this interpretation.	Weick (1995)
	The process of gathering and interpreting both intuitive and analytical information regarding events, or issues, as well as the decisions made and the actions taken.	Schneider (1997)
Source: Own compilation.		

3.4 SENSE RECEPTION ELEMENTS

‘Strategy translation’ can be determined by the presence of the **five** elements associated with **sense reception**. The absence of these elements could mean ‘sense reception’ does not take place, thus resulting in either a poorly ‘translated strategy’ or ‘non-translation of the strategy’. The **five** elements developed from literature that characterise sense reception are:

1. **‘Buy-in’**
(ownership) of the strategy;
2. **‘Personalisation’**
of the strategy (receiver’s personal meaning making);
3. **‘Context-specific application’**
(receiver’s unique application);
4. **‘Modified enactment’**
(reflecting the change in mindset and thinking by receiver);
5. **‘Accurate renditioning’**
(reproduction or re-telling by the receiver) of the strategy.

The above five elements are further expanded to guide understanding of ‘sense reception’. Several more propositions are brought forward in line with these five elements and they will be linked to each element. They are given the code “**P**” and numbered accordingly.

3.4.1 Buy-in (implementation conviction)

Bartlett, Marshall and Marshall (2012:17) emphasise the importance for organisations to pay attention to buy-in, to create ‘strategic’ awareness. They further highlight that buy-in from all levels in the organisation, particularly the lower levels, could enable individuals to perceive the causal linkages between objectives and outcomes and drive their commitment to improving performance on the leading

measures of financial success. If there is no conviction with the sense receiver, who is usually the 'implementer of a strategy', then it becomes difficult for them to implement it successfully. Meaning-making literature emphasises that once meaning around a situation is developed, then the willingness of the actor towards set goals may improve (increase).

When individuals understand what their role in 'strategy implementation' is, they are more likely to indicate whether or not they concur with the 'set strategy' (Boswell *et al.*, 2006). Krauss (2005) confirms this by indicating that what has a *common meaning to a group of people* may have a *unique meaning to an individual member* of the group. Understanding 'unique' meanings has to do with the construction of the meaning process and the many different factors that may influence it. Consequently, it can be said that when people are able to develop a 'unique meaning' around a strategy they are more likely to buy-in to it.

People are both 'emotionally' and 'intellectually' inclined, in that they create a connection based on both knowledge and emotion. Thomson, De Chernatony, Arganbright and Khan (1999:819-835) indicate that 'buy-in' can take two forms:

1. **Intellectual buy-in**
which refers to
'knowledge and know-how of processes, people and practices', and
2. **Emotional buy-in**
which refers to
feelings of employees that affect their decisions to act on their knowledge about an organisation and buy-in to business goals.

From this distinction it becomes clear that in attempting to encourage the buy-in to a strategy, managers must do so in a way that appeals to the individuals' 'sense of self' as well as their level of acumen and knowledge base.

Furthermore, in attempting to encourage the buy-in into a strategy, managers need to consider the factors that may *enhance or hinder buy-in*. These include, but are not limited to: employee dis-engagement, low employee commitment, distrust, and insufficient time allocated to strategy (French-Bravo & Crow, 2015). An engaged employee has an emotional attachment to their organisation, which leads to that

worker acting in a way that promotes their organisation's interest. Organisations can sustain 'employee engagement' through: the clear communication of a credible and compelling message to employees; through building trust and developing influential communication platforms and, finally, through inspiring and energising views about the organisation to employees (Kumar, 2015).

By understanding the reasons for 'commitment' as part of buy-in towards a strategy, management may be able to identify better whether or not the strategy is actually received and accepted as a result of understanding it, or if employees action the strategy as a result of other unrelated forces (such as, loyalty, fear, responsibility, inexperience, for example). Building on the work done by Thomson *et al.* (1999), McKenzie, Truc and van Winkelen (2001) indicate that commitment can take on both an intellectual and an emotional form, where intellectually, a person can logically justify the need for commitment but still feel not fully committed and, inversely, be emotionally committed to a cause', without any logical explanation for it.

This commitment to a cause (such as strategy) is indicative of how people may make sense of situations and has an influence on how they will choose to act. This appears directly linked to the trust factor. When an employee trusts a manager and his / her judgement regarding risk and other factors that affect a strategy, it can ultimately influence their commitment and thus buy-in into the strategy (French-Bravo & Crow, 2015). Buy-in is, therefore, attached to sense reception as it is linked directly to the receiver's willingness to buy-in to the given strategy. Through accurate communication and feedback among the management levels, managers can have meaningful conversations/discussions regarding the strategy, how individuals fit in, its direction, how it can change and thus understand how to align the strategy better with the sense receiver (implementer) and thereby enhance buy-in.

It thus leads to the proposition that:

<p>P2: Buy-in (engagement) is a key antecedent of enhanced sense reception in strategy translation.</p>
--

3.4.2 Personalised meaning making

The most fundamental aspect of a human social setting is that of 'meanings'. The trans-behavioural nature of meanings reveals that meaning not only describes behaviour, but justifies and interprets it as well (Krauss, 2005). 'Meaning making' is derived from the 'sense-making concept', in that individuals have to use their past experiences to generate and draw meaning from various situations.

It can thus be said that the 'notion of meaning', being central to human life, is a prevalent one (Park, 2010). Beijaard, Verloop and Vermunt (2000) explain that issues of identity are at the core of sense making, that is, the meanings that people attach to themselves or that are attached to them by others. Park (2010) further draws attention to the fact that that meaning is paradoxical, in that when creating meaning, one needs to both illuminate and obscure certain aspects to understand the situation. A continuing misconception within organisations is that relentlessly communicating a strategy will lead to success. Communication without comprehension, however, may lead to ineffective implementation.

A common understanding of the strategy is needed within the organisation, especially if there is a large gap between those who formulate the strategy and frontline employees (Danford, 2011). While this is true, it is equally important that individuals are able to develop their own construction of the strategy and what it means to-and-for them. When one translates strategy, one generates meaning for himself / herself and others. It should not be about always giving any and all information relating to the strategy but rather about making available the *relevant* information necessary to enable others to make sense, thereby creating their own meaning (Lowe, Rod & Hwang, 2016; Koniger & Janowitz, 1995). It is vital that we understand that, in translating strategy for sense reception to take place, a system needs to be generated that allows for personalisation of the meaning of the strategy for one's own understanding.

Klinger (1977) and Park (2010) speak about the subjective sense of meaning as being a state in which one experiences feelings of 'meaningfulness' and a sense that one has purpose or direction. We can, therefore, say that a strategy has to be understood by the receiver in accordance with its purpose as well as from a personal capacity perspective. The perceived purpose is derived from seeing *actions*, which are

orientated towards a desired 'future state or goal' (Park, 2010; McGregor & Little, 1998). The sense of having 'made sense' is considered by meaning-making theorists as the most important outcome of the entire 'meaning-making' process.

In line with the concept of personalised meaning making, it thus leads to the proposition that:

P3: Personalised meaning making by the receiver is a key antecedent of enhanced sense reception in strategy translation.

3.4.3 Context-specific application

Many organisations repeatedly fail to take into account employees' contributions towards 'strategy implementation'. This is often reflected in an organisation's inability to provide a context for employee behaviour and may result in individuals who are not able to perform to their maximum potential (Danford, 2011). Actors often attempt to make sense of uncertainties and search for meaning within an organisational context (what certain things or actions mean for the organisation as a whole). Through this process they collectively make sense of their realities and interactions (Golob *et al.*, 2013). By developing this shared meaning and understanding of strategic problems, one can, therefore, observe that actors are able solve problems through collective insight. What appears to be sometimes lacking, is the transfer and use of this collective insight to an individual's own context (Pajela, Roberts & Brenner, 2020).

It has long been established that, in attempting to understand organisations and how they function, one needs to investigate *not* whether organisations perceive and think, but *how* they do so. It is imperative that we study *how* organisations gather and interpret information about their environments to understand why they behave the way they do. It is thus essential that we understand how organisations 'make sense', and, sometimes, make 'nonsense' (Schneider, 1997; Bogner & Barr, 2000). Solving strategic problems requires strategic agility and this requires a keen awareness of strategic circumstances as they arise in their specific context and that of individuals. Managers need the ability to conceptualise strategic issues in a general and individual

specific sense to be able to frame, communicate, and develop strategic alternatives (Brannen & Doz, 2012; 2010).

When deconstructing knowledge, be it simple or complex, individuals will make use of 'cognitive maps'. Knowledge is stored in people's minds in the form of cognitive maps (McCaskey, 1982; Weick & Bougon, 1986). These cognitive maps are formed over time through education, experience and interaction with others and can be considered as a way to steer senses and drive behaviour. A cognitive map of a certain situation reflects a person's belief about the importance of issues as well as the cause-and-effect relationship between them (de Wit & Meyer, 2005).

Cognitive maps can act as both distractors and contributors when coming to translation or de-construction of a strategy. This is because cognitive maps allow focus on specific areas or phenomena, while blocking out 'noise' and quickly making clear to the sense maker how a situation should be perceived. Cognitive maps can act as a perceptual filter that helps the senses to select and understand external stimuli and, simultaneously, reduce data available for accurate decision making (Starbuck & Milliken, 1988; Ogunbiyi, Basukoski & Chausalet, 2021). Shared cognition is, therefore, essential in strategy conceptualisation and translation as it is inferred that it allows for knowledge sharing and builds shared understanding (Hope, 2010), thus ensuring that any content missed or misunderstood by an individual, can be clarified or reinstated.

The ability to use the accumulated knowledge in various ways is essential for any manager in strategy. An individual must, ideally, be able to apply knowledge transferred to various contexts and, more specifically, to their own (Wooldridge, Schmid & Floyd, 2008; Whittle & Mueller, 2011). Once 'sense is given' and the 'strategy is translated', the receiver creates what is known as '*situational meaning*'. That refers to meaning in the specific context of a particular environmental encounter (Park, 2010). When we speak of 'specific context' in this study, we speak of the 'immediate direct environment' wherein the individual functions. Therefore, following 'sense breaking' and 'sense giving' by the sense maker:

The way the strategy literally translates for application in the direct personal work context of the receiver, can be considered / referred to as “context-specific application”, thus, the micro-environment of the specific employee as context.

What is important when considering ‘sense reception’ is the need for managers to be aware of the ‘cognitive limitations’ and the ‘absorptive capacity’ (Lane, Salk & Lyles, 2001) of those who receive the translated strategy, specifically if they are the eventual implementers of the strategy. This capacity directly affects an individual’s ‘understanding’ and ‘reception’ of translated strategy and thus the potential to influence the eventual ‘implementation of the strategy’ within the individual’s direct working environment (Vuori & Virtaharju, 2012). From the literature researched, it is clear that ‘context’ matters, not only for ‘strategy translation’, but for its ultimate ‘application’ or ‘implementation’. This is supported by Smit *et al.* (2021).

Based on this, it thus leads to the proposition that:

P4: Context-specific application is an antecedent of enhanced sense reception in strategy translation.

3.4.4 Modified enactment

‘Enactment’ is defined as the bringing of events or structures into existence by constructing, re-arranging, singling out, and / or dismantling organisational features in the environment. The term ‘enactment’ is used to preserve the central point that when people act, they not only bring events, constraints, and opportunities and structures into existence but also set them in motion (Weick, 1979; 1988). People tend to construct a shared understanding of the world by interacting with each other within a group over an extended period. By exchanging interpretation of what they see, individuals enact a shared reality (Daft & Weick, 1984; Smircich & Stubbart, 1985).

Managers who draft a strategy that is not appropriate to the environment wherein they function or who lack the ability to disseminate learned external knowledge through application (enactment), might not be able to effectively translate or apply it.

Understanding and assimilating complex organisational knowledge requires active engagement of both parties (the sense giver and the sense receiver) as well as certain structural and cognitive preconditions (Lane *et al.*, 2001). I propose that the presence or absence of these cognitive preconditions can be checked through the ‘sensing loop’ prior to implementation.

When observing strategy translation, it is essential that we consider the *perceived strategy versus the actual intended strategy*.

This perception is linked to sense, more specifically to “sense received”. The perception determines how people seek to understand sense/strategy and how they choose to *act* upon their own perception, irrespective of whether that perception is right or wrong (Van Zandt, 2001; Weber, Thomas & Stephens, 2014; Wooldridge, Schmid & Floyd, 2008). When translating a strategy, ‘knowledge’ and ‘not only information’ is conveyed. If only information is conveyed, we may be looking at ‘sense taking’ occurring as opposed to ‘sense reception’ (Kumar & Singhal, 2012).

This means that even though ‘sense is given’ there may still exist the ‘*inability of participants to take action*’, following the translation. In contrast, when ‘*sense reception*’ takes place, it means that the ‘sense given’ is not only understood, but absorbed to the point where the role players involved can act appropriately on, use practically and correctly apply concepts based on the ‘sense received’. A strategy wrongly perceived, regardless of how well-crafted, will ultimately lead to failure of implementation of the ‘*intended strategy*’ (Helms Mills, Thurlow & Mills, 2010; Heinrichs, 2021). This further encourages the ‘sensing loop’ or ‘sense checking’ wherein there is constant feedback between the different levels of management to ensure that they are still enacting the correct strategy.

In practice, ‘modified enactment’ may entail receivers to change or adjust their strategy-related behaviour (actions) and direct their activities to that which is more aligned to the organisational objectives and goals. It thus leads to the proposition that:

<p>P5: Modified enactment informs the level of sense reception in strategy translation.</p>
--

3.4.5 Accurate renditioning

Accurate renditioning is related to the concept of the “commons”, defined by Rossignoli, Ricciardi and Bonomi (2018:421) as a system that:

- a. provides a community with resources, particularly human capital, available for collective use, and
- b. requires cooperation by users to maintain its capability to (re) generate the common resources provided by the system.

Renditioning can be seen as:

1. a sense “giving”, and
2. a sense “checking” exercise as it allows for the receiver to give a narrative of his or her understanding and experience while offering the giver an opportunity to check the validity or correctness of the renditioned strategy.

‘Sense giving’ is, however, not always the most beneficial way to operate. ‘Organisational communication’ may also be intended to destroy *existing* meanings to change them, through ‘sense breaking’ (Pratt, 2000; Mantere, Schildt & Sillince, 2012). One often has to ‘break down’ sense for others as a way of ‘giving’ sense. Ordinarily sense may be given with the aim of ‘building coherence’ with established reputational narratives (Dowling, 2004; Brown & Thompson, 2013). Whereas, when one wishes to improve their ‘reputation-creating narratives’, they should engage in ‘sense breaking’ for the benefit of the receiver (Aula & Mantere, 2012). Thus, once the strategy has been broken down and then given to the receiver, it is critical that they are able to give an accurate narrative or rendition of that strategy. Riessman (2008,1993) and Brown, Colville and Pye (2014) indicate that narratives allow one to organise past experiences and, at the same time, provide a way for individuals to make sense of the past.

Riessman (2008, 1993) further indicates that, when narrating, the concepts or stories must always be remembered in context and done in such a manner that considers and draws in the audience. ‘Renditioning’ takes into consideration that, due to the social nature of communication, when people re-tell a story (or strategy in this case)

it can take on different forms and is often fluid. The narrative of the strategy can be seen as multiple, socially constructed and re-interpretable (Andrews, Squire & Tamboukou, 2013, 2008; Cunliffe & Coupland, 2012; Meretoja, 2021). It can therefore be said that, when renditioning what has been translated (personal) interpretation is inevitable (Riessman, 2008, 1993; Brown, Stacey & Nandhakumar, 2008) and thus the need for a feedback loop in strategy translation becomes evident. During the activity of 'renditioning', the 'sense giver' would be able to 'confirm' (check) whether or not 'reception of the strategy took place'. If reception has taken place, the sense receiver would be able to give an '*accurate rendition*' of the translated strategy and, if not, it would be inaccurate and, as a result, require 're-iteration' by the sense giver.

The concept of 'sense reception' requires users to make use of the resources within an organisation in a collective manner. A key requirement is that of the *regeneration* of those capabilities and resources. This means a regeneration of knowledge and information often needs to take place when translating a strategy (Fenton & Langley, 2011; Fiss & Zajac, 2006). This 'collective nature' is part of what effective strategy translation attempts to achieve.

It thus leads to the proposition that:

<p>P6: Ability to accurately rendition the strategy confirms enhanced sense reception in strategy translation.</p>

Strategy should not be perceived from a single management level, but from a multi-level perspective. A leader that embraces both a top-down and a bottom-up influence allows for organisational change and flexibility. In so doing, the leader not only advocates for change but also learns from the feedback of those down the line (Dadi & Kitaw, 2017; Barta & Barwise, 2017). Additionally, embracing a multi-level perspective may aid in resolving differences in relation to shared sense.

In this section, the aim is to emphasise that renditioning (sharing and re-telling) of sense in the translation of strategy needs to be as transparent as possible to avoid erroneous and unprincipled behaviour by actors. Group decision-making, informed by

the organisational culture, is influenced by “renditioning” (as a feedback mechanism), and is, as such, an important aspect of strategy translation (Brady, Davies & Gann, 2005; Barta & Barwise, 2017). Stefanski, Leitze and Fife-Demski (2018) posit that when individuals have what they consider to be a culturally significant story, they produce better retellings, thus better translation. Here, the *importance of context* once again becomes evident (Colville, Brown & Pye, 2012; Bryman, Stephens & Campo, 1996), further highlighting the *intricate nature* of the ‘reception elements’.

Rossignoli *et al.* (2018) speak of organisational logic, which is characterised by respectful, multi-sided interactions between parties. The various logics of actors should be viewed as complementary rather than opposing categorical imperatives. They stress that organisational logic targets network-level collaboration of all parties involved (Smit *et al.*, 2021). The proposed strategy translation framework focuses on creating and building organisational and individual logic around the translation of a strategy and the importance of renditioning as a confirmation instrument to strategy translation.

3.5 THE STRATEGY TRANSLATION INTERFACE

Organisational culture, as previously alluded to, has been identified as one of the key factors associated with the success of the ‘execution of a strategy’ (Alamsjah, 2011). While this is true, management needs to identify accurately the elements of that ‘culture’ which drives execution. An organisational culture, wherein knowledge sharing is encouraged, may ultimately drive employees to share meaning beyond knowledge. Thus, it becomes abundantly clear that the organisation must consider both itself and individuals when attempting to translate strategies (Cornelissen, Mantere & Vaara, 2014; Krauss, 2005). Alcácer and Chung (2007) indicate that it is through observing other group members’ perspectives that the decision-making process at group level changes substantially. In line with this study, they further highlight that, unless the context is simple, *transparency which relates to effective transfer of the strategy message*, may not be possible.

Hence, there exists a need for *cross-hierarchical accountability* by all actors, which may result from organisation-specific solutions. In translating strategy accurately, the focus depends on the ability of the actors to make sense of a situation collectively

(Rossignoli *et al.*, 2018). This is the reason emphasis is placed on ‘shared sense’ and, more importantly, on the *interaction during sense sharing* to ensure ‘accurate translation’, ‘behavioural modification’ and to check for ‘reception of the strategy’ (Lowe, Rod & Hwang, 2016; Weick & Quinn, 1999).

This study proposes that the Strategy Translation Interface (STI) Framework (**Figure 3.2**) can be used as a “test” for assessing the ‘reception of the translated strategy’. The interaction between ‘sense making’ and ‘sense giving’ is reflective of the ‘level of sense reception’ that can take place. The size of overlap needs to be as large as possible to ensure effective translation.

It is imperative that it is recognised that ‘sense reception’ can be moderated and mediated by a host of factors. It is not simply about whether or not the ‘receiver understands the message’. I propose that, when looking at ‘sense reception’ in isolation, there exists several key *enhancers* of reception and several key *distractors*. These could influence the level at which sense is received and have an influence on the actual overlap between ‘sense reception’ and ‘sense giving’, ultimately influencing ‘strategy translation’ (Till, 2021; Weber, Thomas & Stephens, 2014). These could be seen as moderators of ‘sense reception’ (five factors have been discussed so far in **Section 3.4**) and originate endogenously and exogenously.

The greater the size of the STI intersection, the better the apparent reception. To increase the overlap in STI there is a need to *increase* the enhancers and *decrease* the distractors of ‘sense reception’. If the drivers are not enhanced or harnessed, this may influence the receiver’s ability to ‘receive the strategy sense’ (influence translation). It is ‘therefore’ important to take cognisance of the exogenous factors as they may have a disproportionate influence on how a receiver receives sense (receptiveness). The below strategy translation framework (2) is proposed as the: Strategy Translation Interface (STI).

STRATEGY TRANSLATION INTERFACE (STI) FRAMEWORK

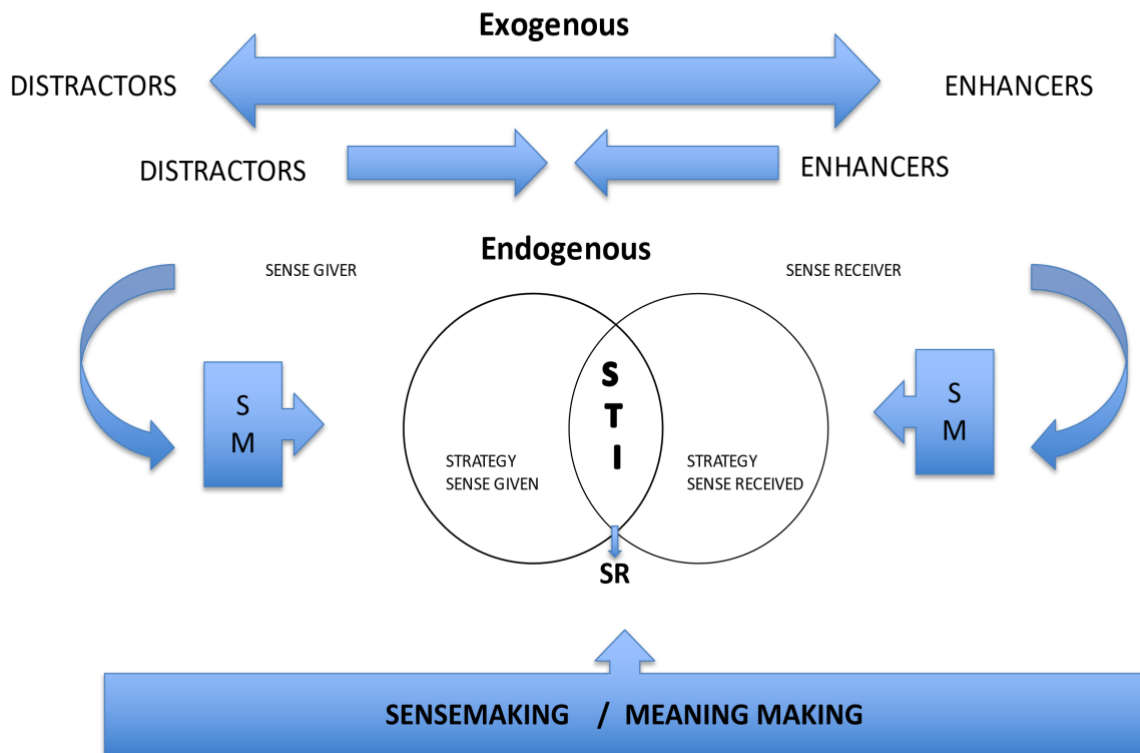


Figure 3.2: Strategy Translation Interface – framework indicating the relationship between the sense giver and the sense receiver to inform sense reception

Source: Own compilation.

As is evident from the STI Framework, there are various factors that could influence whether or not translation takes place and to what extent. The source of translation influencers is: The *exogenous* factors are *external to the receiver*.

The receiver can choose to ignore or consider these factors while the *endogenous* factors are intrinsic and, as such, cannot be ignored (the receiver cannot ‘walk away’ from these). These factors may have an influence on the receptiveness of the translated strategy, in that they influence the level of reception that takes place. The level of overlap will ultimately influence the reception of the translated strategy. ‘Sense reception’ thus moderates the relationship between ‘sense giving’ and ‘translation’. At all times ‘sense making’, ‘sense giving’ and ‘meaning making’ are involved, as was highlighted by the “Hierarchical-sensing loop” (Chapter 2).

3.6 SENSE RECEPTION: AN ENHANCED DEFINITION

As defined in **Section 3.2**, ‘sense reception’ refers to:

“The degree to which the ‘cognitive maps’ of the ‘sense receivers’ overlap with those of the ‘sense givers’.”

I further layer the definition by stating:

Sense reception can be seen as the achievement of implicit sense by the receiver, which manifests in behaviour that is characterised by:

1. Buy-in to the strategy;
2. Personalised meaning making;
3. Context-specific application;
4. Modified enactment, and
5. Accurate renditioning.

Source: Own compilation.

‘Sense reception’ is aligned with the intended ‘sense conveyed’ by the ‘sense giver’ of the strategy.

These concepts are not mutually exclusive, or hierarchical in nature but are interrelated. Notably, they are all required for ‘sense reception’ to take place.

3.7 CHAPTER SUMMARY

Chapter 3 introduced and discussed the unresearched and under-reported concept of “sense reception”. It identified ‘sense reception’ as crucial to ‘strategy translation’ and highlighted its role in ‘building and maintaining organisation logic’. This chapter discussed and expanded on five “indicators” of ‘sense reception’ and linked them to the proposed strategy translation framework. Several propositions were presented. Finally, the chapter ends with an enhanced definition of ‘sense reception’ which guides the research. **Chapter 4** opens and elaborates upon the research process followed by the study.

CHAPTER 4: RESEARCH DESIGN, PHILOSOPHY AND METHODOLOGY

A CASE STUDY ANALYSING THE IMPLEMENTATION OF STRATEGY IN SOUTH AFRICAN ORGANISATIONS

“Normal is an illusion. What is normal for the spider is chaos for the fly”-

Charles Addams

07.01.1912 – 29.09.1998

4.1 BACKGROUND TO THE STUDY

It has been confirmed that ‘strategy implementation’ in organisations remains an elusive problem. Abundant difficulties lie between the principle of ‘strategic alignment’ and the reality of ‘implementation’ (Beer & Eisenstat, 2000). ‘Communication failure’ has been cited as a major factor why strategy implementation fails (Rapert *et al.*, 2002; Aladwani 2001; Sterling, 2003; Atkinson, 2006). However, Baker and Nelson (2005:44) assert that, in attempting to diagnose ‘organisational failure’ and, in turn, ‘strategy failure’, it is important to realise that there are several pitfalls. They further assert that these pitfalls happen in both the ‘understanding’ as well as the ‘source of decline’.

As the above quote by Charles Addams suggests, what one individual might consider ‘common knowledge’ might render another ‘confounded’. It is, therefore, imperative that we understand fully how ‘individuals make sense of information received’, how ‘individuals convey information to others’, and how ‘individuals draw value from what is conveyed to them within organisations’.

4.2 THE PURPOSE OF THE STUDY

This study was proposed in fulfilment of a PhD (Business Management). The study intended to determine how managers at different levels use various ‘sense tools’ to interact better with ‘strategy in practice’. This was reflected in the proposed Hierarchical Sensing Loop (**Figure 2.1**). It concluded by developing and analysing the

proposed concept 'sense reception', in which the study aimed to address the gap found in literature by proposing a framework for strategy translation (**Figure 3.2**).

The study conceptualised and expanded the concept of 'sense reception' and attempted to probe and identify the linkages between 'sense reception' and the 'translation of strategy' in organisations. The study focused on how the strategy message is translated and transferred along the organisational hierarchy with the development of a framework (**Figure 2.1**) and placed specific emphasis on the receivers of sense.

4.3 METHODOLOGY

This section provides a description of the intended research design, descriptors of research as well as sampling, data collection, and analysis methods used in this study. The quality and rigour of the proposed research design and the research ethics associated with this study area also discussed.

4.3.1 Description of inquiry strategy and broad research design

Cooper and Schindler (2011:141) affirm that, although there are many definitions of research design, the essentials of research design are:

1. An activity- and time-based plan.
2. A plan always based on the research question(s).
3. A guide for selecting sources and types of information.
4. A framework for specifying the relationships among the study variable.
5. A procedural outline for every research activity.

To gather the relevant data necessary for analysis, this study followed a qualitative method of inquiry. **Table 4.1** gives an indication of the descriptors of research utilised in the study.

4.3.2 Rationale for using a qualitative research approach

'Qualitative research' aims to achieve an in-depth understanding of a situation, whether or not it explains, for example, why a person entering a grocery store will choose to begin shopping in a specific aisle or explains why some advertisements make us laugh and contribute to our commitment to a brand, while others make us angry, thus leading to us 'boycotting' the brand.

Table 4.1: Descriptors of research

Descriptors	Motivation
Exploratory Study	<p>The study aimed to explore the ways in which strategists translate meaning and, in turn, strategy.</p> <p>Detailed information was therefore required to <i>understand better</i>, as there was uncertainty as to what constitutes strategy implementation failure and whether or not the sense loop can influence effective strategy translation.</p> <p>Managers were required to divulge information on their feelings, knowledge and personal experiences.</p>
Communication Study	<p>This is a communication study as the subjects were questioned and their responses collected by personal means.</p> <p>The data were collected using individual in-depth interviews.</p>
Ex Post Facto Design	<p>There was no control over variables and therefore no ability to manipulate them.</p> <p>This study was not experimental.</p>
Descriptive Study	<p>The study aimed to understand how strategy is translated down the various levels of management.</p> <p>It also aimed to understand how strategists make sense of data obtained or given to them.</p> <p>The study assessed whether or not there were any pitfalls that could have been avoided (in terms of failure) or whether or not strategists employ any specific tools when translating strategy.</p>
Cross-Sectional	<p>The study was carried out once, at one point in time and not over an extended period of time.</p>
Case Study	<p>The emphasis on detail provides valuable insight for problem solving which aided the study.</p> <p>In-depth interviews allowed the researcher to probe for more detailed answers.</p>
Field Setting	<p>The study was conducted within a field-setting environment.</p> <p>The interviews took place in a location agreed upon by the interviewer and the participant, namely, the participant's place of work.</p>
Modified routine	<p>Participants were made aware that they were participating in a study which would be used for doctoral research. They were advised they could withdraw from the study at any time should they so desire.</p> <p>They were all requested to give consent to partake in the study.</p>
<p>Source: Adapted from Cooper & Schindler (2011).</p>	

Cooper & Schindler, 2011 aver that if one wants to extract feelings, emotions, motivations, perceptions or self-described behaviour then qualitative research is ideal. All the above relates closely to the concept of 'sense reception'.

Creswell (1998) explained that one undertakes qualitative research in a natural setting where the researcher is an instrument of data collection who gathers words or pictures, analyses them inductively, focuses on the meaning of participants, and describes the process in expressive and persuasive language. This means that qualitative researchers study things in their natural setting and attempt to make sense of, or interpret, the phenomena in terms of the meanings people bring to them. Whether or not something is considered a 'fact' in the first place depends on the qualities people find in it. It is true that some qualities are easier to discover than others are. For instance, it is much easier to discover that boiling water burns one's skin than it is to discover that water is made up of molecules comprising atoms (Weinberg, 2003).

According to Creswell (1998) there are several reasons a researcher would choose to undertake qualitative research:

- The research question often starts with "How...?" or "What...?" in contrast with quantitative questions which question "Why?" In the case of this study, the researcher was interested in the "How?" of strategy translation.
- A qualitative study is chosen because the topic needs to be explored. By this it meant that the variables cannot be identified easily; there are no theories to explain the behaviour of the participants or their population of study.
- There is a need to present a detailed view of the topic.
- The qualitative approach is chosen to study individuals in their natural setting.
- A researcher has an interest in writing in literary style.
- A qualitative approach is chosen by a researcher to emphasise his / her role as an active learner who can tell the story from the participants' views rather than from an "expert" view.

The design of this study is a phenomenological study. 'Phenomenology' refers to a person's 'perception of the meaning' of an event, as opposed to the event as it exists external to the person. The purpose of using this specific type of study was to understand experiences from the participants' points of view. A phenomenological study attempts to understand people's perceptions, perspectives, and understandings

of a particular situation. It tries to answer the question: “What is it like to experience ‘such and such’?” For instance, a researcher might study the experience of people living in an abusive relationship or those caring for a dying relative (Leedy & Ormrod, 2013).

4.4 RESEARCH PHILOSOPHY

Saunders, Lewis and Thornhill (2007) define ‘research philosophy’ as the worldview that drives the investigation, research methodology, assumptions, practical considerations and the relationship between knowledge and the process by which it is developed. Similarly, a philosophical framework can be explained as the worldview within which the research is situated (Quinlan, Babin, Carr, Griffin & Zikmund, 2015). The study adopted a social constructivist (interpretivism) worldview (Guba & Lincoln, 1994; Denzin & Lincoln, 2011). This worldview holds that social occurrences develop in social contexts and that individuals and groups create, in part, their own realities (Quinlan *et al.* 2015).

A ‘social constructivist’s’ outlook is that meaning attached to our experiences or to objects is varied, multiple and subjective. Therefore, when conducting research, researchers need to look at the complexity of views rather than just narrowing meanings down to a few categories or ideas. This suggests that subjective meanings are not merely imprinted on individuals but are formed through interactions with others and through historical and cultural norms that operate in individuals’ lives (Creswell 2018; 2009; Pomeroy, Herrmann, Jung, Laenens, Pastorini & Ruiters, 2021).

Mouton (2006) highlights that, as human beings, we exist in multiple contexts and as such use what he refers to as “lay knowledge” which is acquired through learning, experience, and self-reflection. He further opines that various terms are used to describe this body of lay knowledge: common sense, wisdom, experiential knowledge, self-knowledge, insight, practical knowledge and know-how, all of which are developed as a result of social construction.

‘Constructivist researchers’ often address the ‘processes’ of interaction among individuals. They also focus on the specific contexts in which people work and live to understand the historical and cultural settings of the participants. The researcher intends to make sense of (or interpret) the meanings others have about the strategy

world. For this reason, 'qualitative research' is often called 'interpretive research' (Creswell, 2018). This study investigated strategy translation within two organisations from a multi-level perspective.

Through the protocol, the study interrogated the interaction among the management levels and how the strategy was 'constructed' by both the 'sense givers' and 'sense receivers'. The context within which managers worked and applied strategy was questioned and, through the narrative of the participants, the researcher sought to develop understanding and draw value.

4.5 RESEARCH DESIGN

The study used a 'case study' design. The need to use case studies arises whenever an empirical inquiry needs to probe a contemporary phenomenon in its real-life context, especially when the boundaries between phenomenon and context are not clearly defined and evident. In line with the reasons for choosing to investigate a phenomenon qualitatively, case studies are preferred when 'How?' and 'Why?' questions are being posed, and when the investigator has little control over events and, finally, when the focus is on a contemporary phenomenon within some real-life context (Yin, 2003; 2014; 2017).

A 'case study' method is one which explores real life, a contemporary bounded system (a case) or multiple bounded systems (cases) over time, through comprehensive in-depth data collection involving multiple sources of information and reports a case description and case themes (Creswell & Poth, 2016). Through exploring case data, a researcher is able to identify patterns and relationships. This allows for the creation, extension or testing of a theory (Remenyi, 2013).

4.5.1 Case selection

The case selections were based on the involvement of multiple parties during the strategic-management process, with emphasis being on organisations with well-established strategic practices and procedures. The case organisations were identified and then selected by means of a non-probability sampling method because there was a *certain pattern scheme* in mind, namely *strategy professionals/strategists*. Specifically, the purposive judgement sampling method was used as participants were chosen for their unique characteristics or experiences.

This study's main focus was on managers and was, therefore, participant-specific and could not use just any available participants (specifically operational and non-managerial staff) as they might/did not meet the criteria.

The disadvantages of using a non-probability sampling method were that, because field workers choose their own subjects, there is a greater opportunity for bias to enter the sample selection procedure and to distort the findings of the study. Another disadvantage is that the range within which to expect the population parameter cannot be estimated (Cooper & Schindler, 2011). The specificity of the sample created a further issue of data accessibility. Many of the organisations approached were unwilling to partake in the study due to time, privacy and availability concerns and constraints.

The researcher had hoped to be able to use the proposed translation framework to analyse two types of strategies in two organisations:

1. Strategies wherein successful implementation was claimed, and
2. Strategies that had experienced constrained or no implementation.

Investigating strategies on both ends of the implementation spectrum may have permitted a broader and more balanced understanding by removing what may be considered 'bias' by management towards well-performing strategies.

Owing to the nature of the study, it however, became apparent that this would be difficult as some of the information was confidential and so the protocol focused on the main factors, namely: how 'translation of a strategy' takes place and the association to the various "senses".

As indicated, the researcher was aware of the potential limitations in terms of participant bias and data accessibility and these were taken into consideration. The two selected organisations (which indicated multiple case studies were used for this study) provided a basis for cross-case comparisons and provided insights into the research questions. The opportunity / choice of two organisations instead of one allowed for richer data gathering and an opportunity to understand the differences and similarities between the cases (Hancock & Algozzine, 2016). Furthermore, multiple case studies may enable a researcher to predict either contrasting results for expected reasons or to obtain similar results in the studies. In this way, the researcher was able to clarify whether or not the findings are valuable (Yin, 2018).

4.6 RESEARCH OBJECTIVES

The research aimed to achieve the following objectives:

- To conceptualise the role of ‘sense’ in strategy and to propose a ‘new sensing concept’ known as ‘sense reception’
- To gain insight into the practices and processes that are used and applied by the managers when embarking on ‘strategy translation’ across the management hierarchies.
- To identify whether or not the elements identified in the conceptualisation of ‘sense reception’ are present in practice.
- To develop an enhanced ‘strategy translation framework’.

Table 4.2 further summarises the study aims and objectives.

Table 4.2: Tabulated study aims and objectives based on Yin (2018:66)

Component	Description
Research Problem:	<p>It has been alluded to that communication is the major factor in strategy implementation failure. However, despite addressing communication, the ‘execution gap’ remains a problem. This study aims to offer an alternative framework to understanding strategy implementation failure by focusing on understanding the role of ‘sense reception’ on strategy translation and, ultimately, how it may effect strategy implementation.</p> <p>Understanding the hierarchical sensing loop is critical to strategy implementation. If there are breakdowns in the loop or mismatches between the three processes, then strategy implementation may be impacted negatively.</p>

Component	Description
Research Aim:	To understand better the concepts of 'sense making', 'sense giving' and propose 'sense reception' through analysing how these theories/concepts influence 'strategy translation' across various management levels within organisations.
Research Questions:	<ol style="list-style-type: none"> 1. Is sense reception a plausible concept? 2. What is the relationship between sense reception and strategy translation? 3. What informs the existence of sense reception during strategy translation? 4. How can the proposed sense framework address effective translation across the management hierarchy?
Context:	<ul style="list-style-type: none"> • Persistent strategy implementation failure in organisations • Failure of strategy conceptualisation/translation within organisations
Phenomena Investigated (Unit of Analysis):	<ol style="list-style-type: none"> 1. Sense reception 2. Strategy translation 3. The relationship between sense reception and strategy translation.
Unit of Observation:	<p>Strategists / professionals who are involved in the strategic process in their respective organisations.</p> <p>The study focused on two cases, in two separate organisations.</p>
Method:	<p>In-depth analysis (phenomenological study).</p> <p>A narrative (story-telling) thematic analysis method.</p> <p>The study also used the "interview to the double" method of data collection to obtain as much information as possible.</p>
Logic Linking the Data to the Propositions:	At top-management level, executives are generally responsible for strategy formulation and the execution is the responsibility of middle- or lower-management.

Component	Description
	<p>There are fundamental issues with execution of the formulated strategies in organisations.</p> <p>This study aims to address these issues by assessing the “gap” between formulation and execution and there is a belief that the issue lies with the ‘translation’ of the strategy.</p> <p>‘Translation’ requires ‘sense making’ and ‘sense giving’ by top management and necessitates ‘sense reception’ at middle- and lower-levels of management.</p> <p>The study aimed to link ‘sense’ to ‘strategy translation’ across the three levels of management.</p>
<p>Criteria for Interpreting the Findings:</p>	<p><u>Sense is received when:</u></p> <ul style="list-style-type: none"> • There is ‘buy-in of a strategy’. • Managers are able to develop ‘personal meaning’ of the ‘strategy’. • Managers are able to ‘understand’ and ‘apply’ the ‘strategy’ within the context of their jobs. • Managers are able to ‘enact or action’ the ‘strategy’. • Managers can ‘accurately rendition’ or ‘re-tell the story of the strategy’. <p><u>Strategy translation is improved when:</u></p> <ul style="list-style-type: none"> • ‘Sense reception’ takes place.
<p>Definitions of relevance:</p> <p>Sense making: How people make sense of their experiences in the world (Klein <i>et al.</i>, 2006:70). It is a process by which individuals develop cognitive maps of their environment (Ring & Rands (1989:342) in Weick (1995:5)).</p> <p>Sense giving: Refers to the conversational and narrative processes that senior managers utilise to influence the sense making of others in the organisation to redirect their understanding at times of strategic change (Balogun <i>et al.</i>, 2014:187).</p>	

Component	Description
	<p>Sense reception: Sense reception can be seen as the achievement of implicit sense by the receiver, which manifests in behaviour that is characterised by:</p> <ul style="list-style-type: none"> [1] Buy-in to the strategy, [2] Personalised meaning making, [3] Contextual-specific application, [4] Modified enactment, [5] Accurate renditioning. <p>Strategy translation: The transfer of a set strategy from the strategy formulator (sense giver) to the strategy implementer (sense receiver), for the purpose of contextualisation with the aim of ultimate implementation of the handed-down strategy. (Proposed definition - own compilation.)</p> <p>Strategy: The coordinated means by which an organisation pursues its goals and objectives (Carpenter & Sanders, 2009:35).</p> <p>A good strategy: This study wished also to focus on what is representative of a 'good strategy'. Rumelt (2011) describes a 'good strategy' as one which recognises the nature of the challenge and offers a way of surmounting it. He further defines a 'good strategy as a highly focused, problem-solving activity'.</p> <p>By looking at strategy implementation failure through a different lens, the study hopes to offer an alternative methodology to problem solving in strategy.</p>

4.7 RESEARCH PROCEDURES

4.7.1 Initial scheduling of visits

Following the case selection, the researcher began the data-collection process. A letter approved by the Research Committee of the University of Pretoria was addressed to the Chief Executive Officers of the target organisations to seek permission to conduct research in their respective organisations. Once permission was granted by the organisations, preliminary information on each participating organisation and the members of staff was reviewed. This information included any public information on the organisation's strategy, including their annual reports,

integrated reports and any other information relating to their strategy procedures and processes.

4.7.2 Determination of persons to be interviewed and other sources of information

The basic idea of sampling is that, by selecting some of the elements in the population, conclusions may be drawn about the entire population (Cooper & Schindler, 2011). The theoretical foundation of the study was 'sense making', specifically 'sense making in strategy', with a specific focus on the use of 'sense in strategy formulation and translation of the message along the management hierarchy'. It also drew from the extant literature on 'meaning making' and 'strategy-implementation failure' in various organisations.

A 'triangulation' approach was used to collect data across the management levels. Multiple sources of data were used including: interviews, presentations, strategy plans, other data collected within the organisation, organisational implementation procedures and any other relevant documentation (Yin, 2018). The goal was to gain an holistic view of the use of sense in the translation of the strategy message as well as to assess how or whether feedback occurs between the various levels of management during the strategic management process.

Primary data were collected by means of in-depth, face-to-face interviews with strategists from the two case organisations. The targeted sample was represented by the various management levels and included:

- (1) executive or top-level management,
- (2) middle management, as well as
- (3) lower level or operational management in the case organisations.

There was no specific reference to the type of industry or organisation type. Employees on a more operational or non-managerial level would not have been an appropriate sample as they would not be involved in the 'translation', but rather the 'implementation of strategy' at its most basic level.

The selected individuals were all based in Gauteng Province (South Africa). Data were obtained in two metropolitan cities, namely: Johannesburg and Pretoria. The chosen locations were selected based on the availability of businesses in those areas.

It was thus based on appropriate sampling as well as ease of access. Secondary data (in the form of reports, surveys and publicly accessible information) were requested to allow the researcher to gain a general idea of the structure of the organisations, to assess where a formal process is followed in formulating and actioning strategic plans and to find any identified information gaps. The researcher held a meeting (interview) with each of the identified persons.

The sample selected within the case organisations did not follow a strict number of participants to ensure that data saturation took place beyond the recommended sample. The number of people to be interviewed was initially estimated at six per organisation, bringing the total number to 12 participants, which is when data saturation generally occurs (Guest, Bunce & Johnson, 2006). Owing to the structure and size of the respective organisations, the original sample size was too small and thus non-representative. The final number was: 10 participants from **Organisation 1** and 13 participants from **Organisation 2**, bringing the total number of participants to 23. The selected numbers gave a greater insight into the 'strategy translation' process and provided a broader perspective. **Table 4.3** gives a breakdown of the sample numbers per organisation.

Table 4.3: Number of managers interviewed

Position	Organisation 1	Organisation 2
Top-level manager	2	4
Middle-level manager	4	5
Lower-level manager	4	4
Total	10 out of 10 managers	13 out of 30 managers
Source: Own compilation.		

Approximately 6 hours per interview were allocated for each participant, which included preparation, the actual interviews (which took place during October and November 2018), analysis of the responses and writing up which took approximately 8 months to perform the previously mentioned tasks, at a work rate of 6 hours per day. The practices used matched those from Stake (2006). The aim of the study was outlined briefly for the participants before the interviews occurred and sent through the channels that were acceptable to the organisations, mainly e-mail.

Owing to the nature of the participants' roles, the researcher considered the work commitments of the participants. So, an estimated four months were assigned for data collection. However, the interview process was efficient and the interviews were concluded in two months.

Owing to Covid-19 restrictions and the researcher contracting Covid, it took a further two years from the time of data collection to write up this document.

4.7.3 Interview protocol and case questions

In preparation for the interviews, upon identifying and confirming appointments with the case organisations, the researcher obtained the secondary data to familiarise herself with each organisation and to obtain any available information on the strategic-management procedures of the two organisations. Structured, open-ended questions were used in the one-to-one, in-depth interviews. This method of data collection was chosen because it is more personal in nature and gave the researcher an opportunity to probe the participants to obtain as much relevant information as possible. Interviews in a qualitative study are rarely as structured as interviews conducted in a quantitative study. They are either open-ended or semi-structured and, in the latter case, revolve around a few central questions (Leedy & Ormrod, 2013). This was the approach used in the present study.

Participants for these individual in-depth interviews were chosen not only because their opinions would be representative of the dominant opinion but because their experiences reflected the full scope of the issue under investigation (Cooper & Schindler, 2011). The interview is a conversation; it is the art of asking questions and listening. At least two people are required to create the reality of the interview situation and, in this situation, answers are given.

This study also made use of an interview method acknowledged by Nicolini (2009) as 'interview to the double' (ITTD). The ITTD requires participants to imagine that they have a 'double' who will take their place in their workplace the following day. The "interviewee-instructor" was asked to provide the necessary detailed instructions that would ensure that the interviewee double is not unmasked.

In his analysis of various studies Nicolini noted that there are systematic similarities as well as differences in the accounts given by subjects when answering through traditional interviews and through the ITTD method.

The ITTD involves an indication of speaking to a fictional 'double', and so, it not only triggers an internal dialogue but also helps subjects to remain focused on the minute details of daily practices that might have been overlooked in a traditional interview. This method of conducting an interview was seen as effective as it lifted off some of the pressure on the participant because it does not feel formal and like a 'traditional' interview and the participant is not required to answer 'directly'.

The interview protocol (**Appendix B**), content and the analysis of the secondary data were designed to gain answers to the interview protocol investigative questions. Thereafter followed the case-study investigative questions which related to the questions to which the researcher required answers (regarding the 'sense reception' elements) and not those asked in the interview protocols (**Appendix B**) (Yin, 1994).

4.7.4 Pre-testing the data-collection instrument

Yin (2018) describes a pre-test as an occasion for a formal "dress rehearsal", in which the data-collection plan that is used is as faithful to the final plan as possible. The final draft questionnaire was pre-tested using the participant pre-testing option, which meant the research instrument was tested with participant surrogates (individuals who have characteristics and backgrounds similar to those of the desired participants). Three managers (one from each level of management) in Johannesburg, South Africa, were asked to participate in an in-depth interview as though they were the final participants.

All the relevant documentation was distributed; the purpose of the study made clear, and all the ethical implications observed and explained. The collection instrument was pre-tested using the non-collaborative pretesting method. In this form of pre-testing, the researcher does not inform the participants that the activity is a pre-test, and it is still possible to probe for reactions but without the co-operation and commitment of time provided by collaborators. The benefit of using this approach is that the questionnaire can be tested under conditions approaching those of the final study (Cooper & Schindler, 2011). This method was especially useful because the

information obtained from the participants in the organisations was then used as the main sample due to the richness of the data, the minimal changes to the final instrument and because further participants were obtained in that organisation through “snowball sampling” (Cooper & Schindler, 2011).

The conversational nature of the interview meant that several questions were answered before the researcher had asked questions. The protocol was, therefore, followed but it was found that the questions did not always need to be asked sequentially.

All interviews were recorded with the permission of the participants. A case study journal was used during and after each interview to reflect on the observations made, the actual responses, and possible sources of interviewer bias. Journal codes (**Appendix D**) were developed to make sense of the data. The questions in the interview protocol were aimed at investigating the framework developed as well as to build upon the sense-reception concept. The hope was to identify further elements in sense reception, or to find that some elements may have proven inadequate to define and understand the concept.

4.7.5 Analysis plan and case-study reporting

The interview data were recorded and catalogued in clusters according to the questions being answered. The clusters were categorised **firstly**, according to the various elements of sense and, **secondly**, according to the methods of translation used. A further clustering of the data according to the experience level, size of organisation, and managerial level was done to seek any emerging patterns. Information was tabulated in accordance with each question with a descriptive analysis of the responses to the questions (see **Table B1** and **Table B2** in **Appendix B**).

Responses to questions were analysed using thematic analysis to arrive at dominant themes. All data collected through the multiple sources were then triangulated to assess the integrity of the data and corroborate facts and validate evidence (Yin, 1994).

Individual cases were developed for each of the two organisations (**Section 5.2** and **Section 5.5**). These cases tell a brief story of each the organisation by discussing

contextual information about the organisation, including background, history, strategy plans, organisational implementation procedures and any other relevant information informing the strategy. The 'sense reception' elements were also checked for, to observe whether or not 'sense reception' plays a role in understanding and actioning strategy plans. These 'checks' were done in two ways: **firstly** through listening for the participants to mention the elements (voluntarily) and, **secondly**, through probing for the reception elements (**Chapter 3**). The process was described in **Chapter 5**.

4.8 DATA ANALYSIS STRATEGY

Data informing this study were collected in the form of in-depth, face-to-face interviews. The interviews were a combination of prolonged as well as shorter case-study interview questions. Yin (2018) makes a distinction between the two by stating that the 'prolonged' case study questions the participants' interpretations and opinions about people and events as well as their insights, explanations and meaning relating to certain occurrences. The shorter case-study interview is open-ended and shorter, and the interviewer is more likely to follow their research protocol more closely. The method used for this study was a combination as there was a reliance on personal experience, interpretation and meaning related to strategy while still following the protocol.

Interviews were analysed using thematic analysis. 'Thematic analysis' was used to analyse categories and present themes (patterns) that relate to the data (Ibrahim, 2012). Data analysis was undertaken using a combination of two different methods of analyses. Firstly, with guidance from Maguire and Delahunt (2017) where basic thematic analysis was explicated and, secondly, the study incorporated the use of thematic networks. 'Thematic networks' are web-like graphics that summarise the main themes constituting a piece of text. This method removes any notion of hierarchy, giving fluidity to themes while emphasising their interconnectivity throughout the network (Attride-Stirling, 2001). The reason for the combination is because it offers structure while allowing detailed analysis.

Braun and Clarke's (2006) 'six-step framework' was then used to analyse the data collected. These steps, which are explained in more detail below, are:

- becoming familiar with the data,
- generating initial codes,
- searching for themes,
- reviewing themes,
- defining themes and, lastly,
- writing up the findings.

The study used the six steps to analyse both organisations individually at first to make sense of the data gathered and then analysed both organisations together: **firstly**, to determine whether or not key similarities or differences existed in the findings and, **secondly**, for validity. The steps followed in the data analysis process are discussed in detail below.

Step 1: Becoming familiar with the data

After primary data collection (in-depth interviews) the recordings were listened to, within a week of conducting the interview, to ensure clarity of sound and to identify any gaps in the protocol that may have been missed during the interview process. Once all the interviews had been conducted, and tested for clarity of sound, the recordings were sent for professional transcription.

To minimise transcription errors and to ensure accuracy, once the typed transcripts were received, they were read by the researcher while the audio played in the background. To achieve familiarity with the data, the interview transcripts were read and re-read several times, first in relation to the interview protocol and then again to engage with the data at hand. This began **Step 2** of the analysis because, by reading the transcripts, potential codes could already be seen emerging from the data. Notes, which included interview summaries, codes and key points were written down in a journal for later use. These notes were marked to identify the organisation and participant (**PT**) number.

Steps 2 & 3: Generating initial codes and searching for themes

'Coding' allows one to reduce large amounts of data into small chunks of meaning. Two methods of coding were used, namely, deductive and inductive. Deductive coding was done based the framework developed for the study (**Appendix I**).

This then allowed for coding in accordance with the themes that centred on:

1. the study itself;
2. themes related to the concept of sense reception, and
3. the strategy translation interface.

The protocol investigated the various research questions and delved more deeply into the presence and application of the following concepts:

- sense making,
- sense giving,
- sense breaking,
- sense taking,
- cognition (ability and limitation),
- communication, and
- feedback

while exploring their bearing on strategy translation and sense reception (with its various elements – see **Table 5.4** and **Table 5.5**). As indicated, journal notes and entries were made during data collection (which led to the codes presented in **Appendices D** and **E**). From these entries, several inductive 'key concepts' (**Appendices F, G, H, J, K, L** and **M**) and codes emerged which fed into the building of the deductive codes and themes (**Appendix I**).

To create and generate themes for the study inductively, the interview transcripts were coded using open coding whereby the codes were developed and modified as the data were analysed anew as there were no pre-set codes. The segments that appeared relevant or important were documented in a journal together with those that emerged from **Step 1**. These codes were then linked to '*families*' which refer to *themes*.

The **first** part of the inductive coding exercise was manual. The process was as follows: once the codes were identified from the transcripts, they were then linked to the relevant developed *theme*.

To develop the *themes*, the researcher used coloured “post-it” notes to allow for visualisation of the data. Each “post-it” *theme* was placed in a row at the top of a desk. The *corresponding codes* were placed beneath the relevant *theme* in the various groupings.

The manual coding and theming exercise allowed flexibility because the codes could literally be moved from one group to another as the researcher deemed appropriate. Through this exercise the codes and themes could eventually be condensed into fewer themes, thus allowing for “*sub-themes*”. A photograph is included for illustration purposes (**Appendix F**).

From the interview data, through a manual coding process, *70 codes* were created, followed by *35 sub-themes* and *15 main themes*, which are indicated in Section 4.9. While seemingly random and perhaps even time-consuming, the manual coding process can be seen as an extension of the **first** step of the analysis process.

Starting the coding process manually allowed the researcher to continue making sense of the data and to find patterns in the data that went beyond reading to contextualising the information in the transcripts. Once the manual coding had been done, the **second** part of the inductive coding proceeded. This was done by inputting the data into Excel¹ spreadsheets. Each transcript was coded per question. Each participant was given a “code name” based on the first letter of the organisation’s name and the order in which they were interviewed, to ensure their anonymity.

These allowed for effective allocation of the participant codes in the first “participant” column, namely **PT1** to **PT23** in both organisations. The question (allocated in accordance with the order of the protocol) was then placed in the second column and the direct responses or “quotes” placed in the next column (**Appendix B**). First-, second- and, in some instances, third-level codes were built from the participants’ direct quotes and inserted into the subsequent columns. Sub-themes and themes were developed from all the codes built (**Appendices D, G, H, J, L, M, N**).

¹ Microsoft Excel for Mac version 16.46.

All this was done by the researcher as well as her supervisor to check whether or not the codes made sense. Codes that were not applicable were removed or modified and, in so doing, cross-checking and co-coding took place to ensure confirmability. Thereafter, using the interview protocol as a guiding tool, the 'questions' were classified in accordance with the concepts they tested. This offered a way to divide them into basic "first-level" groups. For instance, questions related to 'sense making' were grouped and, from the *codes* and *themes* developed, this process was followed for all the other concepts (**Tables B.1** and **B.2**).

Several presentations formed part of the data collection within **Organisation 1**. These presentations were given by management interns to top management as part of a quarterly feedback session within the organisation. The presentations were aimed at gaining their perspectives of the interns on the graduate programme so far as well as to gauge their performance and abilities. During presentations, the interns were asked to indicate whether or not they had experienced any issues of either a *strategic-* or *operational nature* that they could bring forward. They were also asked to present potential solutions.

These presentations were recorded and transcribed similarly to all the interviews. These were analysed in the **first** round of *code-* and *theme-development* (with the interviews) as well as separately, because they were a different data source. These facilitated the trustworthiness of data sources in the study. Twenty key themes were developed *inductively* from these presentations through the use of an Excel spreadsheet and they fed into the reporting of the findings. The codes and themes developed from these presentations are included in **Appendix N**.

Step 4: Reviewing themes

Several themes were identified from the various data sources (journal entries, interviews, presentations) in **Step 3**. Developed themes were reviewed and some were changed, re-worded or condensed. The final selected themes needed to make sense as well as interpret the data clearly, while avoiding definite overlaps. So, some themes were combined. As indicated, two processes were used to code and theme the data at hand: **manually**, using coloured "post-it" notes and **electronically** using Excel spreadsheets. Once *themes were identified*, themes from the Excel coding exercise were combined and compared with the themes from the manual coding exercise. Finally, several propositions were posited as a way to interpret the data. It

was also indicated that the *codes* and *themes* were developed both *inductively* and *deductively*. The delineation themes of those will be discussed further.

Step 5: Defining themes

In this step the aim is to *discuss what each theme is about*. There are several questions that should be asked when conducting this step: *What is the theme saying? If there are sub-themes, how do they interact and relate to the main theme? How do the themes relate to each other?* (Maguire & Delahunt, 2017). Owing to the nature of the study, there were several methods of primary data collection, including: presentations and face-to-face interviews.

Inductive themes were developed from the data collected from presentations and journal entries in **Organisation 1 (Appendices D and N)**. *Codes* were developed from data collected during the face-to-face interviews that took place in each organisation. *Inductive sub-themes* and *inductive main themes* were then established from the codes.

To determine the *main themes*, the themes were first analysed, then cross-referenced for similarities through a filtering and combination approach. Developed sub-themes thus informed the development of the main themes. Once that was done, the final main themes were linked to the translation framework themes to show how the data informed the research (**Chapter 5**).

Step 6: Writing up the developed themes

This step required writing up the developed themes.

4.9 THEMES DEVELOPED

The following final themes were developed:

4.9.1 Inductive themes from presentations and journal entries (Organisation 1)

The inductive themes from the presentations and journal entries are reflected and elaborated upon in **Table 5.2** and include:

The 'domino' effect of incompetence; the African 'knapsack' analogy; shared accountability; mentorship; free thinking; leadership resistance; the fear factor;

empowerment; culture; un-cloud-based (practical) strategy; open system; implication-based strategy; time factor; management of expectations; appearance versus reality, competence versus technology; the 'ignorance' escape route; improved 'stickiness' of translated messages; assumption versus verification and suggestion versus action-centredness.

4.9.2 Deductive codes linked to the translation framework (Organisations 1 and 2)

In defining the themes, the relevant themes were also connected to the proposed framework and linked to the sense-reception concept (**Appendix I**). This was a clear case of deductive coding and theme development.

The pre-constructed themes were:

1. Buy-in (ownership of the strategy);
2. Personalisation of the strategy (receiver's personal meaning making);
3. Unique application (contextualisation) of the strategy;
4. Modified enactment of the strategy, and
5. Accurate renditioning of the strategy.

Here, the presence of the reception elements was 'checked' during the data-collection phase. During the interview process, when asking questions, several questions in the interview were related to 'sense reception' and 'strategy translation'.

4.9.3 Inductive themes from interview transcripts (Organisations 1 and 2)

The following themes were developed from the interviews conducted in both organisations (**Table 4.4**). These were then linked to the framework (discussed in **Chapter 5**).

Table 4.4: Inductive themes developed from interview data

Theme	Theme description
Distractors of strategy	Anything either internal or external to the organisation that that deters strategy (related to the components of translation).
Enablers or contributors of translation	Anything either internal or external to the organisation that acts as a catalyst to the effective translation of the strategy.
Nature of followers	The cognition, experience level and basic makeup of the follower is a determinant to whether or not they can fully grasp the strategy.
Exposure to strategic activities	Managers exposed to strategic activities may have a better or clearer understanding of the strategy compared to those who are not.
Leadership as a translation driver	Leaders can act as a vehicle for strategy translation as they are generally the sense givers.
Organisation paradigm	The structure of the organisation may determine how a strategy is communicated among the various levels.
Cognition influence	How individuals reason greatly affects how they are able to understand and interpret a strategy.
Inclusivity	When managers feel “included” in the strategy (development and implementation) the greater the likelihood of clarity and input they have.

Theme	Theme description
Method of delivery	How the strategy is delivered/communicated to managers can determine how they will respond to it. The 'how' is complex as it does not just focus on the medium of delivery.
Experience factor	The years of experience managers have in strategy can determine how they grasp, accept, reject or engage with the strategy. It can act as both a contributor and a distractor to strategy translation. It may allow them to use heuristics to grasp and apply concepts, or lead them to stick to 'tried and trusted methods' of conducting business. Inexperience may lead to mistakes but may also allow for a more 'open-minded and fresh perspective to strategy'.
Culture role	The culture of the organisation can influence how strategy is translated. Is it open? Does it allow for multilevel involvement? Is it steeped in historical methods? Is it a culture of sharing?
Change interpretation	How individuals respond to change can influence their outlook and whether or not they receive a strategy.
Organisational structure	Hierarchy in organisation. Is there a 'steep' structure or is the organisational structure 'flat'? This could influence how communication takes place between the management levels. The perception of many is that a steep structure does not allow for open conversation.
Expectation management	There's a need to ensure that expectations are managed. So, people know what is expected of them so as to equip themselves and to make sure they have resources to enable them.
Strategic conversation	Questions whether or not there is a narrative around strategy and asks what conversations are being had to encourage the translation.
Source: Own compilation.	

Explanation building was used to provide insight into the improvement of strategy translation in organisations thus, hopefully, leading to improved implementation of formulated strategies. It also shed more light on the relationship between sense and strategy by adding another dimension to sense literature and understanding. The extent to which the current processes and procedures in strategic management support or contradict the extant literature propositions on the research questions was used as a guideline. The multiple sources of data collected above were used to triangulate the emergent and divergent themes that were developed.

4.9.4 Compilation of case study

The structuring of a case study report is largely determined by the audience that it targets (Yin, 2003). This study is an academic study, targeted at an academic audience, but it is expected to have practical value for organisations. The reporting requirements of the conferring institution took precedence and the report was generally composed as explained below.

A descriptive analysis of the responses to each case study question across the two organisations was done using both the translation framework as well as the sense-reception concept on each case. The two individual cases are reported separately in **Chapter 5** but sequentially in **Chapter 6** of the study. The discussion includes a brief explanation of the organisation, followed by information regarding each organisation's strategy as is presented through company documents, websites and integrated report(s). The respective organisation is then discussed in the context of the study, taking into consideration all the data collected. The next step reports *across the two cases* to report on both divergent and convergent themes. In the reporting section of the research (**Chapter 6**) the findings are discussed and reported on together. This approach is more narrative in nature and, while there are comparisons, these findings are between the various participants and not merely a side-by-side comparison between the two organisations.

The adapted case-study reporting approach adopted is a comparative case study, using a multiple-case version of a single-case study (Yin, 2003). The researcher replicates the same study with different cases to identify differences, similarities and unique characteristics that are observed in the individual cases. Contextual themes that are reflected across each case are also reported. Insights gained at the

data-collection stage are also reported. The findings are assessed in terms of the degree to which the research questions have been answered and how the various elements of the developed framework presented themselves. This process began during data collection because the interview protocol was developed with the research questions, and the sense concepts in mind. The nature of the case study promoted an overlap of data collection, analysis and reporting.

This provided the researcher with better insight and an opportunity to adapt the data collection methods, like probing emerging themes (Eisenhardt, 1989:539). This type of flexibility within the case study adds more value to the report.

4.10 VERIFYING AND EVALUATING THE ACCURACY AND COMPLETENESS OF DATA

The interviews were transcribed and field notes were taken. Each transcript was read through by the researcher upon completion and a peer reviewer was asked to do the same to ensure that all the questions had been answered.

4.11 ASSESSING AND DEMONSTRATING THE QUALITY AND RIGOUR OF THE PROPOSED RESEARCH DESIGN

To assess the quality of the proposed research design, this section discusses the reliability, the trustworthiness as well as potential bias and errors of the research design.

4.11.1 Reliability and trustworthiness

The interviews conducted used the measure of *equivalence* to test the 'reliability' of the technique. '*Equivalence*' is described by Cooper and Schindler (2011:302) as being concerned with variations at one point in time among observers and a sample of items. *Equivalence* is the best-suited method to test for reliability because, with equivalence, researchers assess *not how participants differ* from item to item, but how a *given set of items will categorise* individuals. Lincoln and Guba (1985) established a framework with criteria to ensure that qualitative research demonstrates the quality and rigour of the proposed study. These are: credibility, dependability, transferability and confirmability. These criteria directed the study to try to ensure trustworthiness.

'Credibility' refers to how well the data and interpretations of a study echo the real opinions and experiences of the participants interviewed (Shenton, 2004). Polit & Beck (2012) view 'credibility' as the level of accuracy of the data that were collected compared with the 'reality of truth'. The 'credibility' of the study was ensured by using well-established qualitative data collection methods and by using site triangulation, which made use of participants from two different organisations in different contexts to ensure that where the developed themes might have been similar between some organisations, they were not specific to one (Shenton, 2004).

'Dependability' refers to whether or not the data collected and the findings would still hold true if the study were to be replicated (Polit & Beck, 2012). It speaks to whether or not the data collected would still be valid if the study were replicated using different participants (Shenton, 2004). Dependability was satisfied by the research design, sampling, data collection and analysis being discussed, providing a clear description of the research process in the event that someone might wish to replicate it.

'Transferability' refers to how applicable the findings of the study would be if they were transferred to other settings or contexts. Transferability was achieved by a systematic description sample and the organisation they work for, followed by in-depth descriptions of the research design, limitations of the study, data collection methodologies and inclusion of the discussion guide (Cope, 2014; Polit & Beck, 2012).

Finally, **'confirmability'** referring to whether or not the data collected can be verified to ensure that they represent the information the participants provided is discussed in detail in the bias and errors section of this chapter.

4.11.2 Bias and errors

Owing to the nature of case-study research and its reliance on multiple forms of data, it is important to note that the method itself is not without bias. To triangulate, secondary data are often accessed from the organisation and, while they can prove useful, they are not always accurate or without bias. To conduct a thorough review of documentary evidence, the researcher ensured that a systematic search for relevant documentation was conducted on the case organisations. The **first** step was an internet search to collect data about each organisation before the interviews took

place. The researcher also requested access to other relevant documentation and any data collected in-house during fieldwork. The researcher was aware that potential over-reliance on documentation can happen during case-study research and so attempted to ensure there was as much corroboration of evidence as possible between the primary and secondary data sources (Yin, 2018).

To '**prove propositions**' or '**refute any alternative explanations**', scholars can take part in biased interpretation of the data through *selectivity* (Mouton, 2006). To counter this, the researcher had regular debriefing sessions with the study supervisor where the researcher's approach and interpretation was reflected on. This allowed the researcher to question what was learnt and thus develop her thinking and understanding regarding the data (Yin 2014).

'**Interview error(s)**' may occur where the interviewer influences or distorts the result of the interview by having an inappropriate influencing behaviour, things such as *tone of voice, gestures, body language or facial expression*, intentional or not, influence how a participant will respond.

To reduce the likelihood of interview error(s), the interviewer remained professional and impassive, and did not judge the participant or show any emotion that would suggest that the interviewer is being judgemental (Cooper & Schindler, 2011).

'**Data entry error(s)**' may result if an interviewer fails to record answers accurately. This could result from factors that force the interviewer to work under pressure or merely to précis the participants' answers instead of noting down full and complete responses (Cooper & Schindler, 2011:217). This was avoided by requesting permission from the participants (at the beginning of the interview) to record the interview.

'**Social desirability error(s)**' is a type of response bias where participants answer questions in a way that they feel is more socially acceptable. They do this to save face, or reputation with the interviewer or sometimes so that they sound rational or logical (Cooper & Schindler, 2011:222).

To reduce the chances of this happening the participants were asked to answer as honestly as possible and it was explained to them that their answers in the interview

would be used strictly for academic purposes and that the participants would remain anonymous. Additionally, the responses cannot be linked to their sources. This put many of the participants at ease and they appeared to answer honestly.

4.12 RESEARCH ETHICS

While the researcher has the right to search for the truth, it should not be at the expense of rights of other individuals in society (Mouton, 2006). Aspects that related to ethical behaviour during the study were:

- Each participant was informed of the context of the study as well as the purpose of the study before participating in the interview. They each signed an informed consent form to reflect their knowledge and understanding regarding participation.
- It was explained to the participants that participation was voluntary and strictly academic and that no incentives would be offered in exchange for their participation.
- It was made clear to participants that their identity would not be revealed and that they did not need to provide any personal information.

4.13 CHAPTER SUMMARY

Chapter 4 discussed the research design, philosophy behind the research and the methodology followed by the study. It also explicated the research aims and objectives. It discussed how data were collected, analysed and coded for further interpretation. The next chapter will provide an accurate description of the case organisations, detail the method of data analysis and discuss the key findings of the study.

CHAPTER 5: DATA ANALYSIS AND KEY FINDINGS

Chapters 1 and 2 investigated and interrogated literature on the different sense concepts and their link to strategy. **Chapter 3** introduced and discussed the concept of sense reception and thereafter introduced the strategy translation framework. **Chapter 4** focused on the methodology used in the study and gave an indication of how the data were collected and analysed. **Figure 5.1** gives a schematic layout of this chapter.

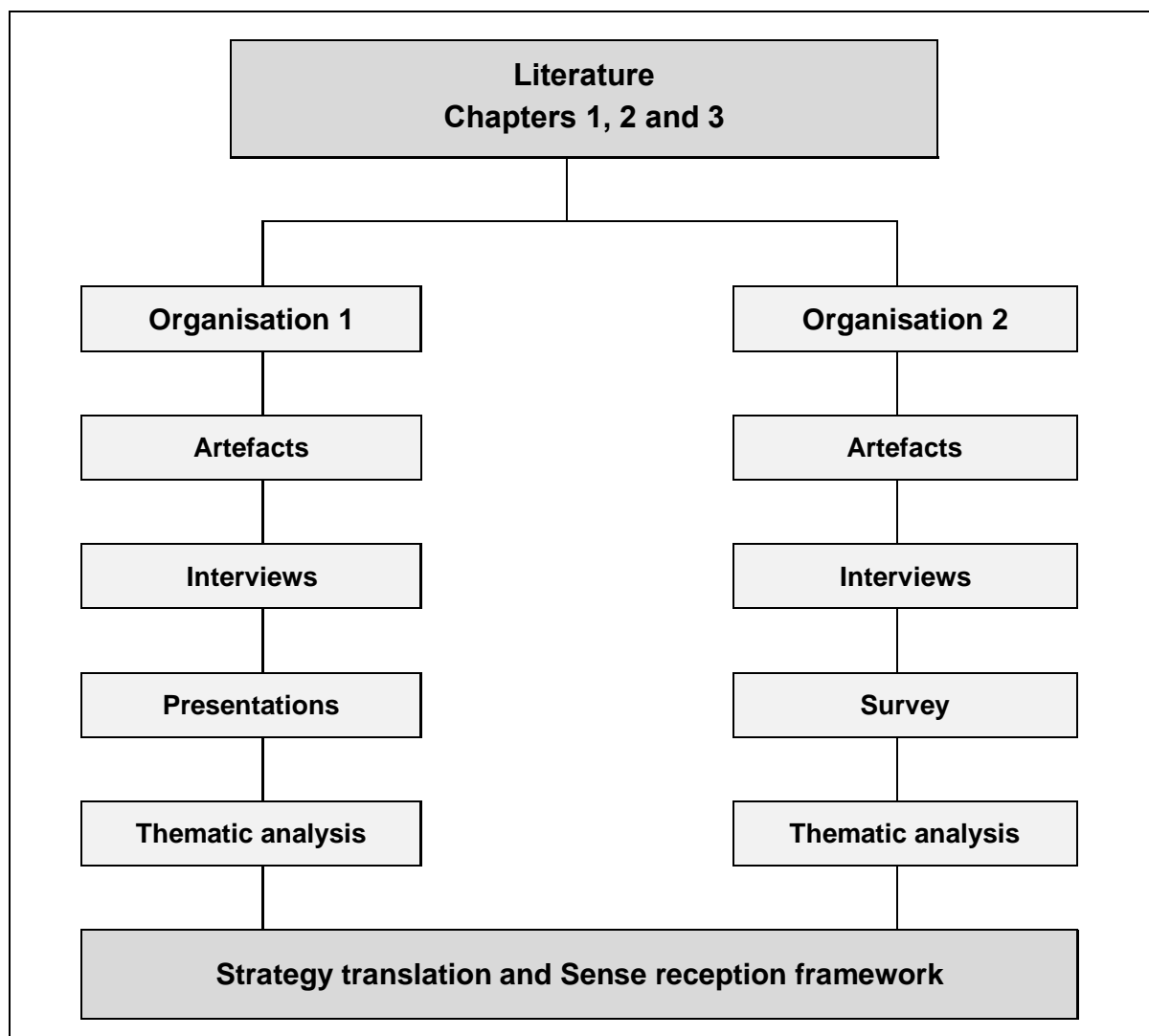


Figure 5.1: Schematic layout of Chapter 5

Source: Own compilation.

The findings developed from the data collected from the two case organisations are highlighted and discussed in detail in **Chapter 6**. Prior to conducting interviews, the researcher embarked on a sense-making exercise by obtaining and using the secondary data available on the two organisations (artefacts). This was done to try to understand and contextualise the respective organisations.

Perusal of secondary data enabled the researcher to have an (somewhat external) indication of how each organisation represents its strategy and how it highlights strategy practices.

The final data sources used in this study included:

1. **primary data** in the form of
 - a. interviews and
 - b. presentations (made in **Organisation 1** on the day of data collection) and,
2. **secondary data** which were gained from websites, internal documents, integrated reports of each organisation, if available, and any internally conducted research. (An internal survey was conducted by **Organisation 2** a few months before data collection).

This chapter gives an indication of the key findings. These will be discussed in greater detail in **Chapter 6**.

The findings presented in **Chapter 5** include the secondary data obtained by the researcher as well as the researcher's "interpretation" of the primary data collected. The interpretation of data collected in the organisations has similarities and differences. The interview outcomes are presented in the same way as the method of data collection was similar.

In **Organisation 1**, the second form of primary data collection was in the form of presentations. The data obtained from the presentations are reflected in **Table 5.2**.

In **Organisation 2**, a survey that was conducted internally was the second secondary source. These data are presented in tabular format. **Table 5.2** contains an exposition but not an interpretation. An interpretation follows the table.

5.1 SUBJECT DEMOGRAPHICS: ORGANISATION 1 AND ORGANISATION 2

Two organisations (**Organisation 1** and **Organisation 2**) in unrelated industries formed the sample. A total of 23 individuals participated in the study (**Table 5.1**). Of the 23 individuals, nineteen (82.6 %) were face-to-face, in-depth interviews and four (17.4 %) were in the form of presentations made to peers, functional heads, the researcher and top management. These presentations included a question-and-answer session, which served to inform the study further. Each participant was allocated a number that corresponded with the sequence in which the interviews took place. For purposes of presenting, analysing and interpreting the data, the participants are referred to by numbers combined with the letters **PT**, for instance, **Participant 1** will be referred to as **PT1**. The respective organisations use specific systems to rank their management levels and so the title and management level are indicated in **Table 5.1**.

Table 5.1: Participant demographics, years of experience and management level

Participant number	Type of primary data collected	Position	Self-declared experience in strategy (in years and months)	Gender	Management level
Organisation 1					
PT1	Interview	CEO	20 years	Male	Top
PT2	Interview	Managing Director	12 years	Male	Top
PT3	Interview	Supply Chain Coordinator (systems)	2 years	Female	Middle
PT4	Interview	Intern Supervisor	1 year 8 months	Female	Middle
PT5	Interview	Supply Chain Coordinator (operations)	1 year 8 months	Male	Middle
PT6	Interview	Intern supply chain and procurement	< 1 year	Female	Junior
PT7	Presentation	Intern (management)	< 1 year	Female	Operational (lower)
PT8	Presentation	Intern (management)	< 1 year	Female	Operational (lower)
PT9	Presentation	Intern (management)	< 1 year	Female	Operational (lower)
PT10	Presentation	Intern (management)	< 1 year	Female	Operational (lower)

Participant number	Type of primary data collected	Position	Self-declared experience in strategy (in years and months)	Gender	Management level
Organisation 2					
PT11	Interview	CEO	11 years	Male	Top
PT12	Interview	Head of Sales	5 years	Female	Middle
PT13	Interview	Chief Operations Officer	10 years	Female	Top
PT14	Interview	Head of Finance	14 years	Male	Middle
PT15	Interview	Chief Actuary	6 years	Male	Top
PT16	Interview	Pricing Actuary	10 years	Male	Operational (lower)
PT17	Interview	Head of Underwriting	10 years	Female	Middle
PT18	Interview	Sales Manager	2 years	Female	Operational (lower)
PT19	Interview	Head of Business Development	3 years	Male	Middle
PT20	Interview	Head of Human Capital	13 years	Male	Middle
PT21	Interview	Claims Operations Manager	3 years	Male	Operational (lower)
PT22	Interview	Portfolio Manager	10 years	Female	Operational (lower)
PT23	Interview	Sales Manager	5 years	Male	Operational (lower)
Source: Own compilation.					

5.2 BRIEF DESCRIPTION: ORGANISATION 1 (SECONDARY DATA)

Organisation 1 is a South African company that has been operating in the personal protective equipment (PPE) sector since 2002 and supplies various sectors. The sectors they service include: services industries, manufacturing, mining, retail and road safety. With < 50 employees and an annual turnover of < USD 2.5 million, the company or group can be classified as a small business as defined by the National Small Business Act as Amended (Act No. 29 of 2004) (RSA, 2004).

The company claims to be a leader in developing and implementing cutting-edge solutions for health and safety as well as outdoor and leisure industries. Their continued success depends on sustainable growth and, as such, the company indicates that their plans for the future will work only if they are able to sustain them with resources, people and the right processes. With the company growing continually, they monitor progress to meet expectations, cope with change in demand and live up to promises, now and in future. The stated aim of **Organisation 1** is to “assist their customers grow and plan better for each tomorrow”.

To reinforce its strive for continual innovation, the company has a training institute which serves as an innovation and business incubator aimed at supporting young employees for work-readiness.

5.3 INTERVIEW FINDINGS: ORGANISATION 1 (PRIMARY DATA SOURCE 1)

5.3.1 Understanding strategy as a concept

While the concept ‘**strategy**’ did not appear foreign to the participants, some participants indicated that the only knowledge they had regarding strategy was what they had learnt while at university. In other words, they possess “book knowledge” only on the subject of strategy. The statements below illustrate this:

PT3: *Experience in strategy, specifically, no. As a chapter in my studies, yes.*

PT4: *I probably have knowledge based from what I studied at 'varsity.*

PT5: *Yes, I would say so, because I mean from what I have learnt from university... I think it's 'strategy'.*

Only three of the ten participants (30 %) seemed to have a working knowledge of 'strategy'. These were participants who had claimed experience in the field. Once the interviews commenced it became clear that, while they were in a management position, some three of the ten junior participants (30 %) were more operations focused. They seemed eager to talk about what their daily jobs (operational activities) entailed as opposed to how their job fits into the strategy or strategic objectives of **Organisation 1**.

All the participants knew and understood what the vision elements of the organisation and the main drivers of the company were. They were able to state and explain clearly what their role in actioning the strategy was. Many explained it through practices and procedures they followed. Top management appeared to be able to articulate what 'strategy' meant to them, how it was developed, filtered down and ultimately implemented.

Three out of ten (30 %) middle-level managers appeared to play a crucial part in the translation of the strategy. They indicated that several problems arise as a result of the *misalignment* of goals and capabilities and went on to rationalise that this misalignment had in the past, led to inertia and non-responsiveness by employees. This is illustrated below.

PT3: *So, there are still a few areas that we need to work on. For instance, our warehouse process was finalised only a month ago. Yes, and the only reason that that took so long is because we were constantly having challenges that we would have to adapt to, and feel our ways around.*

PT5: *I think most of the time is managers in high levels, they make a mistake of focusing or seeing – let's say, for example, whatever they see ... they see it as it is and to them it looks 'okay'. But the problem they are having is they are looking at it from one perspective, they are not looking at it from the manual, or how can I say this?... the hard-labour perspective...*

[in addition]: ...all those things they take time and detail. So, what that means it doesn't take a minute, it's not going to take a minute. So, having that inclusivity of someone who is not even as high as that, you see they can bring a different perspective to the process as a whole.

PT5: *Because, at the end of the day, if you have one perspective from a high level ... [indistinct] what is going to happen is it's going to seem as if people down there... they are not doing enough. It's going to seem as if they are lazy. They are just not efficient. Only to find that the problem is not the people aren't efficient enough, the problem is you are looking at it from a different perspective. Once you have that perspective then you understand: 'Oh, this has to happen and this and that.'*

5.3.2 The actions behind strategy

Both top-management participants further indicated that several “**actions**” should be taken before a strategy is formulated and that several levels of management should ideally partake in the formulation of strategy as it serves to teach and inform. The statements below support this:

PT1: *If you look at ants you do not tell an ant anything. They know what jobs they have to do. If we can emulate them, that it is better. You know what you need to do... I do not have to supervise and check you the whole time. You think and you can say: “Okay, this is what we have to do.”*

If I can get that ant mentality ...then it is different – does it always translate? “No, it does not because we are human beings, we are full of faults, we are full of emotions... I have a bad day... you have a bad day.” But I believe in a collective because then you become better and clearer and people can spot the problem more easily.

PT2: *Yes, for sure. The main reason for that is people, if PT1 were to go and try to implement a plan on his own, he is going to decide things that are not implementable because he has not been selling the stuff for himself for a very long time, same as me. So, knowing how it is best done in the field, we do not necessarily always know all the answers. So, it is better then, you have guys that are actively involved, a few sales reps or customer representatives, something like that.*

5.3.3 Awareness of employees

In terms of “**awareness**”, four out of ten participants (40 %) were aware of the concept of strategy but not accurately aware of, or able to articulate the corporate strategy and how it relates to them. This is illustrated by the following:

PT4: *So, I am part of the strategy, it is just that I am not sure. If I were to explain the strategy of the organisation to a double, I will have him sit with her (colleague) because she has got a bit of knowledge of every department and she understands our system which is, basically the heart of the company.*

When asked: “Do you think there is a general level of awareness where people understand what the objectives of the organisation are?”

PT4: *I do not think so. I think like we have all got certain objectives that we have sort of like formulated personally.*

PT5: *I play a big role in terms of achieving corporate strategy, because I believe that company that we see out there, it started small to be big. So, at the end of the day the seed is what made the tree that you see out there. So, without taking into consideration that whatever the people who are way underneath you are coming up with and not listening to them can have an effect on your company.*

All the participants agreed that there is a variation among the different management levels as far as perception of strategy is concerned and that it is, in fact, important

that the perceptions of the various management levels differ. Top management indicated that there were methods to handle the variation while still sending down the same message.

Only half of the participants (50 %) were able to relate to strategy “jargon”.

PT2: *The way that I would relate to the term is, an external analysis would be an analysis of how my competitors operate and how my customers operate and how do they need me to support the way that they operate... things like that.*

PT4: *When I think of ‘strategic’ or ‘strategy’, I think ‘planning’ and ‘putting things into place.’ So, you need to know what is happening outside of the business and understand that the development of a strategy includes both internal and external factors.*

PT5: *I completely forget. That means people who are not within my division, they can be my ‘external stakeholders’ – when asked what an external analysis is.*

PT6: *Basically, I feel like you can’t start a strategy without doing an external analysis, because you can do a strategy. If you haven’t done an external analysis, only to find that everyone else is doing it. And you do that strategy not knowing that whatever is happening in another country is going to affect that strategy, or whatever politics, legislation is going to affect that strategy.*

PT:3 *Even though I am supply chain, my main focus is the system and our website, keeping everything maintained. So, for me my external analysis would be what effect, if I make a change on the system, what effect is that going to have on each person in the company?*

Will they be locked out of the system for an hour... if they are locked out how many orders, how much money are we going to lose? So, that would be my main external focus. What effect is this action going to have on other employees?

5.3.4 Preferred method of information transfer

Contrary to the middle managers, the junior managers appeared to be more reliant on the '**directive**' they received from their supervisors before making any decision or taking action.

PT3: *(Middle-level Manager): Okay: 'Let us say in terms of a mistake that has been made, they (team members) would usually just run up to my desk because they are in a panic.*

'And, at the moment, she is the only one apart from me that actually does it correctly, where we do not get any errors. I have to support partly; it is because of trial-and-error where she tried, and she made a mistake and then had to go back.'

PT4: *(Middle-level Manager): I would not say I wait for a directive... maybe I would, okay, sit down and say: 'Okay this is what I think I need to do...'* then just say... *'Okay this is, inform management that this is what I think I need to do.'*

PT5: *(Middle-level Manager) 'So, in the beginning... Yes... you do what he tells you to do but, as time goes on, because the more you are there... the more you see, the more things that could be improved.'*

So, you come to him with more suggestions to say: 'Hey, we can do X, Y, Z.'

'**Guidance**' (not to be confused with "**directive**") and "**coaching**" were something valued by many employees across the management levels. It was viewed as a tool to teach and transfer knowledge.

PT3: **PT1** *was there for guidance, he gave us a lot of good guidance.*

When further asked what '**guidance**' meant for them:

PT3: *To be honest, his patience with us. He really helped. Real life is much different than a book tells you. But he was constantly motivating us. We would be on site and he will call us just to hear if we are okay and if we are coping. So, that helped us to motivate ourselves a lot.*

PT2: *It is coaching, coaching, coaching. Yes, it is coaching. I mean every time that we see the people you try to spend some time with them, time to get, to interact with them on a personal level... this helps break down this barrier and then the people will have more freedom to come and ask questions.*

5.3.5 Relevance of feedback

'**Feedback**' is considered as vital to strategy translation in the organisation. It was apparent that speedy feedback was critical for the participants because of the nature of the business and the fact that innovation was a key performance driver.

PT2: *I mean... after introductions or whatever else... the first point of order it will take is a feedback on how we are... what we have done... what we have accomplished for the last month, three-month period.*

It always, always, always, always starts with a feedback session on how we performed from my last – and I am going to say: 'strategic session' because we have only had one formal one.

PT4: *Okay so, if... if for example, I mean I think it is pretty quick because I have got direct access to **PT2**. If he is not in the office, I call him or I WhatsApp him or I email him. So, for me, I mean getting feedback from there is not... it has never been much of a hassle for me ever.*

PT5: *Feedback happens in two ways, because:*

Number one, we look at their (top management) suggestions.
All right, we try to implement that suggestion.

Number two, what does the customer say in terms of feedback?
It doesn't stop, because things constantly change, like they change from time-to-time.

5.3.6 Perceived barriers and enablers to translation

In some instances, 'age' was highlighted as a potential barrier to strategy translation. This was specific to the industry as the process in the company is labour intensive in nature and includes an 'older' workforce:

PT1: *Yes, and listen... I had old toppies [sic] that worked here and they were full of it. They were good but they were full of it and I got rid of them. They had knowledge, experience, but they could not work with young people. I said: 'This is a young company.'*

PT5: *Because one of my biggest disadvantages now is I want to communicate through the use of technology but I can't, because I am working with older people. So, too much stuff at the same time is going to confuse them and it's going to be trouble. So, I look at them also, do they have the capacity to take this?*

PT3: *Okay, yes, with someone on the same level it is a bit tricky. You always feel like you 'step on toes'.*

PT2: *Yes, and then they consciously and maliciously decide: 'We are not going to follow the process that he has put in place' and, being very good, I mean he is a young supervisor but a very good guy. I need to now get him to the point where he is now willing and able to also take action against those people, but I think that makes him feel uncomfortable now, but you need to be able to do that sometimes.*

The opposite was also found to exist. Translation from the top-down (by older superiors) was indicated as preferable and, to some extent, easier. Top management indicated that, due to their lack of experience, the younger employees tend to be nervous but also seem more open and willing to learn from others' experiences. Top management indicated that they use context in dealing with strategy and when sending the strategy message.

PT1: *So, I believe my job now is to enrich, in the second half of my life, it is to enrich younger people. The experience and mistakes and stuff... help them not to make it.*

PT2: *Like the one that is sitting here, she is extremely stressed up, she gets stressed out by stuff easily. So, a person like that you see: 'Okay, there is a problem, let us get away'... a method to calm her down a bit.*

It could be: 'Come and have a cup of coffee with me.'

It could be: 'Let us go and have a quick game of.... – I want to see if you have improved your game,'... whatever. Things like that, get her to calm down because then when you explain something...

Leadership resistance (even if only on an operational level) was found to be a potential barrier to strategy translation or execution. Where younger leaders (young people in management positions) felt that older staff members questioned the knowledge of the leader.

PT9: *I just feel like... elderly people. There are times I notice that they are struggling with... like getting the stock and they want to get things done at that moment and they don't want to wait for **PT5** to take down the stock or something.*

Education level was also pointed out as key when it came to strategy conceptualisation. It was, however, not seen by participants as a barrier to translation due to the "open" nature of communication in the organisation:

PT6: *They don't only consider the people that went to school because we did procurement, we know better – they don't do that. They listen to everyone, so, for me, it's one of the best things here.*

All the participants indicated that the **method of communication** could either make or break a strategy and that it was key not only to communicate constantly but also that they considered part of what worked to be the 'way' they communicated in the organisation.

PT3: *Communication channels are very open, it's very free in terms of feedback and so forth.*

PT4: *Okay so if, if... for example, I mean... I think feedback is pretty quick because I have direct access to **PT2**. If he is not in the office, I call him or I WhatsApp him or I email him.*

A participant even indicated the **importance of communicating** to everyone involved as it influenced all parties involved.

PT5: *It had to be everybody, because it was influencing everybody as to how things should be done, you understand?*

Participants further pointed out that they preferred **not to follow instructions blindly**.

A key question that was used by some was: "Why should I?"

PT6: *You are told that you must do this. But I didn't know what the implication was... Like I say... the implications... Like that's very important. If I understand why I am doing what I am doing, I am going to do it the way you want me to do it. If you don't explain why I am doing what I am doing, then I am going to be like: "It's just another job, it's just something that I need to do."*

PT4: *While... So, I mean we know, okay?... I need to get to work and do this and this is what I need to – but I do not think we actually understand and fully grasp how it affects the business. So, I mean you understand when you make a mistake that... 'Okay, the reason why you need to place orders in time is because then the customer complains and then there is a delay'. So, and I mean it is not... you do not get here and fully understand that this is the consequences of my actions... you sort of (like) learn the consequences of your actions.*

PT5: *... but the good thing about it is even though I came up with it [idea for implementation], what they did is they discussed that... okay, the HR is going to bring everyone here to add their input into that as well, so that – at the end of the day – we have a complete set.*

In agreement, top management also indicated the **importance of letting people know and understand** why they do certain things.

PT2: *So, I definitely make a plan or effort in making sure the guys know if I ask you to do something, 'Why I am asking you? What are you going to achieve by doing this and what is the company going to achieve if you do this?'*

A key factor to note was the perception by top management that **success of implementation** was not based on monetary accomplishments alone.

PT2: *And I think it is not only monetary achievements. It is also achievements like... there is... you know... job well done. The next time somebody... he is going to remember... last time he asked me something he figured out that I can do this because I am good at this.*

To further equip students or interns, the company has a **work-readiness programme** in place and it became apparent, as they answered questions that some of the participants were not ready or confident enough to take on some of the responsibility. Thus, indicating the importance of the programme in place. Work readiness is something that was also highlighted by top- and middle-management.

The **cognition and ability of employees** is, to an extent, tested by means of job rotation within the organisation. Many participants indicated the value of rotation, especially at a junior level. Storytelling to translate strategy was valued but one participant made an important point, stating: 'That **it must go beyond the story to action.**'

PT10: *Because there is a **difference** between telling you a story and actually showing you how to do it.*

At least eight out of the ten participants (80 %) (on all three management levels) **linked learning to making mistakes**. The CEO repeatedly stated that they allowed mistakes and did not use faults as a punishment but rather as a tool to learn. The interns also mentioned that they learnt through 'trial-and-error'. That said, one junior participant mentioned something critical and that is: 'Mistakes do not beat accountability as far as learning is concerned.'

PT10: *Mistakes were not an issue. Mistakes were there, but there was a difference with me – you see with me and **PT5**, everything is in your hands. If anything goes wrong, you are responsible.*

Six out of ten participants (60 %) indicated that a “**flatter**” organisational structure allowed for better understanding, communication and translation of a strategy. They attributed the ease of access to top management to lack of hierarchy and non-specific communication methods.

This was evidenced by junior staff members stating that they were able to contact their line managers as well as managers on a higher level, like the Managing Director through channels as informal as WhatsApp. The participants felt that a bigger organisation (in their experience) may not allow for effective teaching and learning and makes it hard to control how strategy is translated and understood.

They cited steep hierarchical levels as a barrier to strategy and to learning. When asked how their knowledge on strategy could be improved, many of the participants mentioned “through mentorship”.

Many participants indicated that multi-level inclusivity was key and vital to them learning and understanding the strategy. This inclusivity was based not only on being asked but on gaining a variety of perspectives as far as implementation of strategies was concerned. This was seen to also break down the “education barrier” in the sense that, there was learning that occurred between those who are not qualified but are experienced and vice versa.

PT4: *So, if I get a perspective of someone who actually does the work then I can understand: ‘Oh okay, no we can’t do this’... because, not in a sense that: ‘Because we went to school, we know better, but they are the ones that actually do the job.’*

PT3: *I feel that no matter your level in the company or in the hierarchy, your work has an effect. It is the same with our cleaner for instance. She actually won our very first Innovation Award. Yes, and her ideas were amazing. So, someone who does not have education, so to say, they might have the common knowledge to know a better way than an educated person does. So, I honestly feel include everyone because everybody's opinion can give you a great plan.*

PT10: *I think it would actually improve staff's morale, because no matter how old you are or how small you are, someone honouring you is actually important, and you are actually valued.*

To some, **multi-level inclusivity** also means that all managers are able to communicate their concerns and give recommendations pertaining to execution and that employees understand.

PT5: *I see the cost implications of what they are doing and then I realise: "No, this is not the correct way to do this, or this is not as efficient." So, I go to him and say: 'Okay, here are my data, I have collected them... I think for us to be able to at least find a way, this must be done.'*
'It had to be everybody, because it was influencing everybody as to how things should be done, you understand?'

It is key to note that while **inclusivity is valued**, all **decisions are still hierarchical** and procedural in nature.

PT5: *I can say the way it started is because I report to **PT2** which is on a very high, top-management level. So, I had to go to him first and then he is like: "We will look into it." He had to involve the HR, because people have to be informed. Then he had to involve **PT1** and another individual (X) as well, the CEO and directors of the company as well, because they have to know what is about to happen. So, they went through it.*

Managers indicated that it is critical to **know and understand the abilities and limitations** of people when trying to translate a strategy. One participant indicated that **different "strategies" work for different people**.

PT2: *If you are talking [at] very high level with a person who does not know how to work out margin of profit, you are going to miss the boat. So, you can spend two hours with this guy and achieve nothing. Or, if you know that that person maybe does not know basic limitations of Mathematics, rather draw him a little picture that dictates or depicts what you want to achieve by doing this sale rather than just talking figures all the time.*

Many participants linked strategy and implementation to finance, with some indicating that the implication of non-implementation or failure to implement would affect the organisation and employees financially.

Finally, it was indicated that shared accountability leads to shared sense. So, if the message is not clear to one person the other two can help decipher and translate the message. It is also a form of member checking.

PT10: *So, I will be counting, he will be checking, he will be writing. We are not really going to say: "You are responsible for the counting." So, maybe let's say you count three things and there are four there, I am not going to double-check. Normally it's what happens, because you are thinking **PT1** did the right thing.*

5.4 PRESENTATION FINDINGS: ORGANISATION 1 (PRIMARY DATA SOURCE 2)

One of the other data sources from **Organisation 1** was in the form of presentations. Four management interns (40 %) presented to management (Exco), other functional heads and the researcher. These presentations were aimed at understanding the interns' perceptions of the company strategy and their experience with operations. These can be seen as a reporting mechanism used by the organisation to gather data and remain up-to-date with the knowledge and knowledge gaps of interns. From the presentations, several key themes were developed to conceptualise the information. Each presentation took between 20 and 30 minutes and was interactive in nature, meaning the management as well as the researcher stopped the presenters at several points during the presentations to ask questions to gain clarity.

To make sense of the data presented, the researcher looked for core data within each presentation and conducted a thematic analysis of the data. The process followed

here was slightly different, albeit similarly systematic, to that followed when analysing the interview data.

Table 5.2 gives an indication of the interpretation of data from the presentations based on the core concepts of 'sense' as was done in the interviews. Since all presenters were given a brief on 'what to present on', during the presentations, the researcher looked out for overarching or core concepts. These were noted and later developed into themes. All the themes were informed by the information in the presentations.

Each theme was then given a "name", which is explained in **Table 5.2**, Column 2. The key concept or theme is given first and is followed by the supporting information as presented by the participants. The participants who took part in these presentations offered an excellent opportunity to inform the 'sense-reception' elements. They represented lower-level management and are the 'receivers' of sense closest to implementation of strategy. These participants were recorded as **PT7**, **PT8**, **PT9**, and **PT10**.

While these key themes were formed using the presentation as a base, it is important to mention that several of the themes in **Table 5.2** were also applicable to the interviews as similar observations were made by those who were interviewed. These key themes form part of the themes developed from the interviews and, once filtered, served to inform the final themes in the discussion of the research findings.

Table 5.2: Findings from the presentations conducted in Organisation 1 sorted and interpreted according to themes / concepts

Theme / concept	Explanation of theme /concept	Researcher’s interpretation of theme / concept	Supporting quotes
“Domino effect” of incompetence	Incompetence from one level can filter down to the next.	If one person does not do or cannot do their job, it has wider implications.	<p><i>Everything we do affects each and every one.</i></p> <p><i>Now we are incurring as well handling fees and what not because someone ignored the fact that they need to fill in documentation for returns.</i></p> <p><i>I realised that we have quite a number of problems with stock counting.</i></p> <p><i>One of the major problems is that people count incorrectly.</i></p> <p><i>So, when they count incorrectly, they make our lives exceedingly difficult.</i></p>
African “knapsack” analogy	Making assumptions about knowledge is detrimental to learning and progress.	Speak up if you have an issue or do not understand, otherwise do not complain.	<p><i>I swear that even somebody with Grade 6 would be able to know how to follow those guidelines correctly.</i></p> <p><i>I feel like people were doing this on purpose.</i></p> <p><i>There was no way we would be confused as to how to load these items.</i></p>
Shared accountability can lead to shared sense	<p>Seek more than responsibility.</p> <p>Be accountable for actions as a collective.</p>	<p>Member checking is important here.</p> <p>Team members must verify certain information with each other.</p>	<p><i>It is a little rough in that department, but we are getting there, and I am just proud to say that I have had a good sales team that has backed me up.</i></p> <p><i>Thank you.</i></p>

Theme / concept	Explanation of theme /concept	Researcher's interpretation of theme / concept	Supporting quotes
The “sinking vessel” when captainless	Mentorship is critical to translating strategy.	Junior staff members require mentoring to learn.	<i>The specific division which you actually made a mistake at this point and we are spending money on fixing – money and time on fixing those mistakes when we could have avoided them by having had time to train.</i>
Free thinking	Allow freedom to think by yourself and to self-actualise.	Learning involves being allowed to think beyond the boundaries / constraints.	<i>I would like us to find a new approach to it. Like if it means us going out there.</i>
Leadership resistance	Leaders can be inflexible and resist change. Similarly, staff that resists a leader may not want to follow instruction.	Finger pointing by leaders when things do not go well or according to their exact plans. Staff may also point fingers at a leader that they judge is not competent.	<i>They want to get things done at that moment and they don't want to wait for PT5 to take the stock down or something. So, if the counting is wrong, that particular person must be accountable as to why the counting was wrong. Not that we will say that PT5 is responsible for the counting, because usually what happens is she will call everyone to say: “This is your row.”</i>

Theme / concept	Explanation of theme /concept	Researcher's interpretation of theme / concept	Supporting quotes
Fear factor (mistakes)	Fear prevents people from taking action as they are afraid of making mistakes.	Exposure to certain things may allow for learning by doing.	<p><i>Where people do not understand certain things and they do not ask for fear of seeming incompetent.</i></p> <p><i>I was given a platform to actually interact with other people in a more senior position, who had been an intern 10 years ago and I am an intern this year and I am able to interact with them and actually tell them what we want as a company.</i></p> <p><i>So, I am very much grateful for that opportunity.</i></p>
Empowerment	Real versus 'Bullshit' empowerment.	Giving staff an opportunity to work independently.	<p><i>But then PT5 gave me a platform to actually be able to source for other distributors and also to take part in all of that process.</i></p> <p><i>And then working with systems.</i></p> <p><i>So, in systems I learnt quite a lot.</i></p>
Culture as a driver	Culture that guides behaviour.	Organisational culture can be a block or it can enable.	<i>It is essential to have a basic work ethic whereby everybody knows what to do and how to do it.</i>
Strategy is not cloud based	Strategy should not be thought of as abstract.	Practical / Action base is required.	<p><i>They lost their server... what is it?... about a month ago.</i></p> <p><i>Weren't you part of that when they said they can't do anything because their server crashed?</i></p>

Theme / concept	Explanation of theme /concept	Researcher's interpretation of theme / concept	Supporting quotes
Open system	Open system.	Structure.	<p><i>So, basically, what I have learnt from the seven months is that supply chain and procurement are interlinked.</i></p> <p><i>If you make a mistake in one of the two, the whole process is wrong.</i></p> <p><i>I have learnt to multi-task.</i></p> <p><i>I have learnt to take responsibility.</i></p>
Strategy is implication based	Every action has a consequence.	Causal link of strategy to operations (mistakes can have a dire impact on performance).	<p><i>Just learn and actually understand the implications of not doing certain things.</i></p>
Time factor	Strategy has specific timelines and the timing of actions is equally important.	Training for successful learning especially if there is a deadline (can improve and speed up translation).	<p><i>So, the challenges that I experienced during training were that we didn't have enough time to learn all the tasks that are involved in terms of doing all our daily tasks.</i></p> <p><i>At the time my supervisor had other responsibilities in terms of handling the other three sales reps.</i></p>

Theme / concept	Explanation of theme /concept	Researcher's interpretation of theme / concept	Supporting quotes
Clarity of expectations	Expectations need to be managed to avoid incompetence, assumptions or disappointments.	Sometimes not knowing what is expected of you can lead to failure to understand and act.	<p><i>My expectation, or let me say everyone's expectation when doing a management course is when you get employment you will sit in an office, have someone who will make tea for you [speaking simultaneously – laughter] actually this is what everyone thinks, because even if you go back home they will ask you:</i></p> <p><i>“Do you have an office?”</i></p> <p><i>“Do you wear formal wear?”</i></p> <p><i>That's what everybody thinks, but it's not actually what happens in the real world.</i></p>
Appearance vs reality	It is important to be clear and to make sure whether people understand or appear to understand.	Appear to learn and understand but do not always.	<p><i>Yes, but I mean we are promoting the fact and we are celebrating the fact that we have taught xxx to use the computer, but now I read between the lines that he is not really using it so nicely [well].</i></p>
Competence vs technology	Understand the link and difference between the two.	Tech embarking seen as competence and vice versa.	<p><i>They lost their server, what is it?... About a month ago. Weren't you part of that...? When they said they can't do anything because their server crashed?</i></p> <p><i>Because that's also maybe one of the challenges, some of you don't trust the website.</i></p>

Theme / concept	Explanation of theme /concept	Researcher's interpretation of theme / concept	Supporting quotes
Ignorance escape route	Blaming mistakes on a lack of knowledge of the strategy.	Blame – I did not know, therefore...	<p><i>And then their argument, well... the team's argument is that no one has ever taught us to load items.</i></p> <p><i>So, I am willing to have a training session because even though it's not once off...</i></p>
Improve the "stickiness" of translated strategy	Make sure the message is not only delivered but that it stays.	If people action the strategy, they learn faster and remember concepts better.	<p><i>Do you know why I say: "Yes"?</i></p> <p><i>When you train it becomes part of you.</i></p> <p><i>So, it's a good thing, when you repeat things and say: "This is how you do it"... it sticks in here.</i></p> <p><i>You know you can read things, but when you train then you know it.</i></p>
Assumption vs verification	Always verify before accepting.	Not checking the practicality of suggested strategies and just assuming they will work.	<p><i>We amend orders and then we believe that if we send a "mail" everything will be fine.</i></p> <p><i>We have had instances with suppliers whereby they don't receive these mails, or they just address the first mail that they get, not the second.</i></p> <p><i>Now we are forced to pay for it because it was just a telephonic discussion.</i></p>
Practicality of suggestions	Plans seem to be very "plan based" and do not take practical application into consideration.	Look good on paper but are not practical or feasible to carry out at implementation level.	<p><i>We have communicated this with them... It is getting better but it is still happening.</i></p>
Source: Own compilation.			

The themes in **Table 5.2** are the outcome of the researcher's insight during and after the presentations.

5.5 BRIEF DESCRIPTION: ORGANISATION 2 (SECONDARY DATA SOURCE 1)

Organisation 2 is part of a South African-based financial services group which, as a result of a merger, was formed in 2010. The group is listed on both the Johannesburg Stock Exchange (JSE) in South Africa as well as the Namibian Stock Exchange in Namibia. They identify their primary reason for existence as "there to assist people achieve their financial goals and aspirations".

With the use of financial advisors, independent brokers and new platforms, they aim to help people grow their assets and protect what they value most. They claim to provide value through what they view as client-facing brands as well as through leveraging their extensive financial service offer and other capabilities and specialists. The group strategy is clearly stated and indicative of a company that wishes to be client focused and profitable. Their strategy map details their intended actions to implement the strategy.

Corresponding balanced scorecard measures are linked to each component of their strategy map to track progress with implementation. They indicate that they have strategic focus areas, namely: client-centricity, growth and excellence. This organisation has a steep hierarchy in terms of managerial levels and decision-making power. **Organisation 2**, in contrast to **Organisation 1**, is much bigger and it thus appears as though this structure is best as it allows for more internal control. Various practices were brought forward by top management (which will be discussed in the next section) that indicate that the hierarchy could remain in place without necessarily becoming a barrier to strategy translation.

One of the primary objectives for the 2018 financial year, highlighted in **Organisation 2's** integrated report, was to revamp and reformulate their strategy and the methods used to actually transfer the strategy message through the organisation. It was during this financial period that the board of directors initiated a strategy review resulting in change of some managerial positions. They acknowledged that while their client-centric strategy was still appropriate, new leadership teams were tasked with

implementing the strategy in a more-focused manner to improve performance and introduce the next phase of growth for their group. This made **Organisation 2** a particularly valuable informative case for the study.

Depending on the organisation, its structure and organisational members, the transfer of strategy can be a challenging task to both understand and undergo as strategy can be somewhat of an elusive and, to some, unattainable concept. The researcher used all data sources available to obtain as comprehensive an image as possible regarding the company's strategy. The analysis focused first on the group strategy because the corporate strategy drives the various product lines and group divisions and, in turn, their strategies.

5.6 INTERVIEW FINDINGS: ORGANISATION 2 (PRIMARY DATA SOURCE)

During interviews the researcher was alerted to the fact that there had recently been an initiative within the company to actually develop and foster understanding and embedding of the strategy. Nine out of thirteen participants (69 %) indicated that there had been 'road shows', presentations and strategy sessions which were all aimed at using what they – as employees – called a 'different' approach to translating the strategy. This approach was 'story-telling' in a very literal sense, where each functional area was allocated a specific fairy-tale and given the task of using that story-line to re-tell (rendition) the strategy of the organisation as they saw and understood it. **Appendices O** and **P** contain the results of an internal survey conducted in **Organisation 2**. This survey was conducted by top management to investigate whether or not the strategy was being translated effectively.

5.6.1 Understanding strategy as a concept

The '**concept of strategy**' appeared to be well understood by nine out of thirteen participants (69 %) but it was still, by their own admission, an **ambiguous concept** to some.

PT14: *If I hear that there will be strategic change in a company, I am like: 'Okay, cool, what is that going to mean for us from a profitability, cash-flow perspective, people perspective, etcetera, so strategy is very much a forward-looking sort of view. You asked what comes to mind, to me it's the future.'*

PT15: *It's a bit open for interpretation, the way I like to think about it is it's coming up with a short- to medium-term plan to get to a workable solution for achieving vision.*

PT19: *So, it is one of the challenges with strategy and I am sure you are going to touch on it later as well. In many instances, it is a paper exercise that receives buy-in from enough individuals for it to be... for it to be motivating enough to pursue further. So, when I hear 'strategy', I sometimes get a bit nervous in terms of, you know, how well informed the strategy was formulated. Strategy in essence for me should really be not just one thing. It should be a whole bunch of ... like [sic] smaller pieces. So, consecutive decisions or actions but building towards a larger objective.*

PT20: *Strategy is really about putting, you know, big plans together of how we are going to get to a particular end. That, for me, is what it is about. But how 'we implement' it or how we translate it into something that is 'implementable', I think that word... In fact, maybe we must find a new word, as the word 'strategy' has completely lost its meaning for me. I do think there are pockets of people that I think still understand it and are really trying to work with the meaning that sits behind 'strategy'. But, for the most part, I think it is an overused word.*

PT17: *I think that is the – and I have seen it. There are a lot of times that I did not understand a word they say, and I had to break it down to understand the story, otherwise it is just too difficult.*

5.6.2 The role of the environment in strategising

Participants indicated the **importance of using the environment** to inform strategy and strategy-based activities.

PT14: *If you follow fairly old concepts of a SWOT analysis then I suppose you need to understand what's happening around you to figure out what you are good at and where you can have a niche. So, that I think the biggest thing you want to identify is where the skills and the insights I have are very specific to myself and my environment so that I can figure out where I have a natural advantage and it's that where an external assessment can help you quite a bit with what the environment is.*

PT20: *You do need to understand your external environment, you know, to help you navigate to where you need to go. If you do not understand it, you might obviously hit stumbling blocks. So, I think it is quite important to understand your external world, otherwise how do you map out where you are going if you do not even understand the external world? It does not make sense to me.*

This ambiguity was apparent when participants were asked about certain strategic management 'jargon'. Some of the participants confused some concepts, gave key words or indicated that they did not really understand.

PT13: *Okay, plan, vision, achievement, mission, all of those things.*

PT18: *I am not sure what the external analysis is. So, it is difficult to... so is that the external people analysing where we need to go and helping us to put up that strategy.*

PT19: *Also indicated that a strategy that is heavily jargon based can cause issues and that management needs to take into consideration the language and structure used to translate the strategy: 'Other than just having a list of 12 bullet points. No-one is going to even understand... also many times there are such... it is laced with jargon and people do not understand that and it is very academic... the wording... and it is not... it does not encourage engagement. So, it is about making it a bit more personal [meaningful] to the team.'*

5.6.3 Understanding the structure behind strategy

There appeared **clarity** as to how the strategy is developed and the **process to pass or translate it** to the various management levels.

PT12: *We don't have a strategy management team, we have Exco, Manco and then managers and sort of the flow of the hierarchy.*

PT17: *At the top is the Exco. There that they would have done the strategy and it would have filtered down. It is not like we would just sit there, and they say: "This is our strategy." We had to make sure that we tell a story, to have a strategy that fits into this.*

PT13: *You must "sketch" or "paint" that picture. Because it is like a puzzle, everything fits into – every area... every department, every business unit fits into that bigger X strategy. And, if there's a disconnect – because we are not an island on our own, we operate in this bigger group – if there's a disconnect that people can't see but how does what we are doing here connect to that bigger strategy of the group.*

PT14: *I mean you can't really have an internal strategy that doesn't read well, or is not understood, or not communicated appropriately externally, especially to your shareholders and wider stakeholders. I mean we can't have an internal strategy if our key shareholder, which is call it the X or X Group, does not support it or 'buy' into it.*

PT19: *I think there is always a healthy element of scepticism that needs to be exercised on any analysis. I think it really depends. It depends on, you know... what the... it would depend on exposure to whatever it is that you are trying to achieve. If it is a new market, if it is a new geography, we would be a bit naïve to think that reading up on something could give you the entire picture. And I think, in a lot of instances, corporates do rather than engage with experts within the field... so I am just talking about my experience.*

Many of the junior participants and some more senior staff appeared very loyal to their own functional areas and would often refer to those in relation to the strategy.

PT14: *I think more from a guidance sense as to how a strategy perhaps has an opportunity to play out, because different scenarios, different sorts of views taken on the future from a finance perspective, definitely. I think if you just look at our three main strategic goals for short-term insurance, basically all three of them you can link from a finance perspective being a key driver.*

PT16: *So, first it (strategy) sounds like a big word, it sounds like something only the very, very high up people talk about. But, for me, it boils down to a plan of what we need to achieve and how we are going to achieve it. Almost what our function or purpose of being here is, what I am working towards.*

5.6.4 Fear as a distractor to understanding strategy

'Fear' was identified as a 'distractor of strategy' in the sense that people may not have understood the strategy but sometimes pretend to do so for fear of being deemed incompetent.

PT16: *At that stage I probably wasn't confident enough to question anything, whereas now I feel like I can ask a question, it won't be like... 'Yes, it's a valid question and we will answer it,' but that whole communication of the strategy, I think that's changed... because before we didn't have those sessions where you would sit with your manager and they tell you the strategy that they got from above.*

PT17: *And people think: 'Oh, what are people going to think about me. I am in a role, but I do not understand what these guys are saying.' That is why they do not say. That is what I think.*

5.6.5 Ability to apply context to the strategy

Participants appeared to be able to apply **personal (job) context** to the strategy.

PT18: *So, I think from an Exco level obviously they have more insight as to what is happening in the country, in the world, in terms of insurance, the risk and the opportunities. I think from my level it is to look at what I do. So, more or less saying: 'We need to achieve this.' For example, at the moment the petrol price hike... you know... so I see it not necessarily as a bad thing. We can use it as a selling tool because if you save a client ZAR100 on his short-term insurance, that is going to cover his increased petrol cost. I mean things happen daily in our country at the moment. It is not even annually any more or every six months. It is almost daily that you either receive bad news or really bad news. It is how you use those things to then build onto the strategy.*

PT20: *So, I suppose different worlds will work differently. So, I suppose a finance guy will look at different elements for him. In the Human Capital space, I will look for different stuff. So, again, I think it is dependent on that environment that you sit in. I mean... one quick example now is the guys were saying to me: 'We are five people down in sales.' I am thinking... we keep losing people in sales. For me, that is when you are stepping into – and it is very operational stuff, but you need to start thinking about, but something is not working here, and we need to employ some kind of strategy to ensure that we cannot be five people down. Because five people down means 200 sales fewer. 200 sales mean I shall not meet my forecast for the end of the year.*

So, whatever we said to the CEO we are going to do as revenue, we are not going to hit anymore. So, suddenly things are starting to fall apart. So, that, for me, is when you start 'thinking strategy', not five hours in a board-room and they come up with nothing.

5.6.6 Self-driven initiative to the application of strategy

There appeared to be **less reliance on directive** from employees who seemed to understand the strategy. They indicated that once it was clear to them what they needed to do; they could perform many tasks independently. Independence seems to be something of particular importance for top management. They indicated that focus should be on development, empowering and enabling employees.

PT11: *I think leaders have a very, very important role to play to enable a conducive culture, but you can also be one of the big detractors of culture if, for example, it isn't correct. So, in that context I don't think that it's... I think the days of the sort of single 'hero' leader are long gone. I believe in at a minimum a sort of syndicated leadership. So, you must be able to empower other leaders, build and grow, develop other leaders and then allow them to go and do what they are expected to do and, given all of those things, so unlock potential, set direction, remove obstacles, create culture and a positive environment is then get out of good people's way so that they can do what they are employed to do.*

PT19: *And I think there are many people who have much wider levels of expertise other than the roles that they are sitting in, all interests and I do not necessarily think that is being leveraged enough.*

PT21: *Let's first just take it through the levels and not let everything go to the CEO. Everything can go to the CEO but it's just better... But, in similar vein, they shouldn't skip everyone to go to the CEO... they shouldn't just always skip – I don't want to disempower my team managers either, I want to give them the power and my team managers – we have a very, very open relationship.*

An insightful and substantial observation was made by one of the middle-level management regarding his perception of **why strategy may fail** in spite of measures being put in place.

PT18: *I do not think they (his sub-ordinates) see themselves yet as major role-players in achieving that strategy. So, one of the challenges I am currently facing in my department is we are hitting our sales targets, but it is done with errors and the errors are costing us money. So, it is no use you are bringing me the sales but, on the other side, I need to pay for the errors that you make in your work. So, I think that is where the strategy does not always sort of 'hit home' for people. So, my biggest next two months'... three months' challenge is to bring that home to people.*

5.6.7 Using story-telling to translate strategy

'**Story-telling**' as a tool to translation was used in detail and praised widely in this organisation. The leadership devised a system whereby they gave each functional area a 'fairy-tale' and they were then meant to use it to tell the story of the strategy in a way that made sense to everyone involved in the team and to other functional areas and eventually to the whole organisation.

What was interesting is the assumption by top management that the story-telling tool allowed effective landing of the strategy, which it did, but with more context, you see how the reception was (at a functional level).

PT18: *So, we had a very... so, I said the 'story idea' was a great idea and it was filtered down to us from a story but, I think where we failed as a sales division, it was done in one big group. I would have preferred to have it ... we are three sales managers, each with our people. And I think it would have been more effective if each sales manager took home their own story for their little group.*

One participant (4 %) mentioned the **need to believe** in a strategy beyond its “message” or beyond its perceived greatness.

PT16: *So, I think for me the most important thing when I hear ‘strategy’ or see strategy, I need to be able to **believe** it. So, if let’s say we are trying to – in our context – if they say: ‘we want to be the biggest insurance company in South Africa.’ Then, for me, it seems like: ‘Oh wow... you have already lost me there because I mean... how are we going to do it? Where did you come up with this idea? Is it achievable, realistic?’*

So, if you have any... if you can sort of take someone through the thought process or the research you have done in setting out the strategy, then you almost convince me that this is the right strategy, or the best one that we can achieve.

All participants showed an **appreciation of the story-telling method** of translating the strategy and highlighted that it allowed them to gain a different perspective of the strategy and their roles in attaining the said strategy.

PT11: *I start at the biggest version of the business. I would, at a very high level, tell the strategy story of the business, but maybe the story is not appropriate. I will just share the strategy with leaders, all leaders. We spend a lot of time involving some of them in the formulation of the strategy, but then when we communicate and we share the final version with everyone, I do a lot of that and one of the mechanisms we used was ‘story-telling’. Then we try to equip the leaders with story-telling tools... so, that when they then take responsibility for articulating their part of the strategy in their respective teams or areas, they can also use story-telling as the mechanism.*

PT12 explained the process in detail:

PT12: *So, what happened was that obviously we report into XXY. We were part of this big umbrella and a sub-section of it, so our targets and that are then discussed on the **Organisation 2** board level and what it is we need to achieve as short-term insurance for the next five years and then broken up into sort of yearly things that are ‘bite’ size.*

Participant 12 continued by saying:

PT12: *So, PT11 had a leadership engagement session where he had Exco, all the heads of departments, managers and our team managers, so it was sort of all levels of management in the session. And, in the session, we broke up into groups and he did this presentation on the XXY story. And he told us a story about where we need to go, where we are coming from, how we connect and identify with the story and what the role is that we play in it, what are the challenges that we will face along the way from external economic factors or climate factors to internal factors, and how this fits into this big picture that we have for 2021.*

PT20 elaborated on her view:

PT20: *So, how PT11 did it... he is our CEO... is he used a story, you know, to actually lend our strategy in particular to say where are we going? Who are the stakeholders? And how are we going to get there? And a bit of the journey to say: 'Guys, we are going to have a couple of stumbling blocks, but this is kind of how we think we should deal with them.' So, you have a bit of a journey map if you will. Then ask was that where people go into the different environments, they use a bit of the same because take your own environment and tell the story of how you guys think you are going to get there. So, that was the framework. But it was never prescriptive to say: 'You have to use it like that.'*

PT12: *This year they embarked on a process of story-telling and, in our team, we had to come up with what is our role and how we see the team helping strategy being met and we created a video in our team. So, that storytelling happens consistently from Exco to Manco to all the areas and so I am part of that story. Specifically, in my job every day, day-to-day, when we prioritise a new project and we are very strict: only Exco can prioritise every single thing and we have got a glass wall that we actually stick little cards with our projects on and each one is flagged as to which strategic theme it is talking to.*

Participants stated that **story-telling assisted** in: firstly, understanding the strategy; secondly, in filtering down the strategy and, finally, in giving feedback in an un-intimidating manner. Eight out of thirteen participants (62 %) could identify and state **Organisation 2's** vision from both a corporate and business level. At least ten out of the thirteen participants (77 %) were able to identify and explain the strategic focus areas in relation to their jobs.

Top management appeared to have a keen understanding and working knowledge of strategy and what it meant to them personally and why it mattered for the growth of **Organisation 2**.

5.6.8 Differences in perception of strategy based on management level

There appears to be a difference in how management levels think about 'strategy'. **Cognition, awareness and context** play a bigger role at a higher level, whereas the implementers or operational staff see it as achieving an outcome. Thus, a need to create context-specific meaning is vital.

PT18: *Because there cannot be a strategy without accountability. So, I think if we did it in smaller groups it may have been more effective on the sales advisor level. So, I think on a management level we all think: 'Yes, that is the strategy.' We need to, you know, you think differently than a normal sales advisor who deals with daily struggles and daily life and the kids scream and the husband cheats and meanwhile the company tells me a story about how **I need to achieve strategy**. It's just... it is too far off for a normal person at the bottom.*

PT19: *I think sometimes we become confused. I think sometimes a business does not really understand how it wants to position itself and then it creates this 'kneejerk' in terms of: 'Oh, we need to go and create a strategy without really understanding.' You know what would fit the business well. Now to go and try to force on a business a strategy that does not fit ... I think that happens very often in corporates or many other businesses where... and that creates this bit of a 'cold sweat' breaking out when you hear there is a 'new strategy'.*

PT20: *Typically, our process would be one of the Exco gets together, we have an intense discussion and we challenge them very robustly around where it is that we are going and where we are taking this business. And, similarly, once everybody understands what the XXY strategy is... is then to go into our different environments again... to go and look at your environment and then have the discussion with your teams on how do we fit or how do we feed into what XYZ and, ultimately... or rather XXY... and then ultimately... XYZ wants to do.*

PT21: *Well, I think everyone has something to add – you have more insight from the bottom levels sometimes than when you are on the top level. So, they deal with the face-to-face, day-to-day things.*

It's good for them to bring it up and everyone can talk about it. Sometimes the Head – and if you look at the guy out of 'varsity, he definitely doesn't know things happening on the ground level. Like my boss would say: 'She doesn't believe she is the cleverest, she just believes that she has a lot of clever people and they all have their strengths and we all work well together.' That way we can make a strategy that works.

5.6.9 Clarity of roles matters to employees

Knowing and understanding one's **role in the strategy** was highlighted as critical to the success of a strategy.

PT15: *Yes, so I see that role as the responsibility of the leader of the different environments in which we live. So, in the sales world... so, it may ultimately sit with the head of that environment. Obviously under her she has different layers. And within each of those layers you would expect them to link, because, remember, they are closer to that world.*

PT11: *So, it is how we translate the reason why we exist into something that has value for shareholders and for employees and for clients and it speaks to how we are going to get there and how we are going to measure whether we are successful in implementing... [crudely articulated].*

PT12: *Sometimes that gets a bit muddy. So, I think my overall message would be: Understand what the business is trying to achieve. Understand how you fit in. Understand what others expect you to deliver. Ensure that others know what you are busy with and how you are progressing and, as soon as possible, raise concerns and that is, I think, how I would do it.*

PT12: *Yes, so I see that role as the responsibility of the leader of the different environments that we live in. So, in the sales world... so, it may ultimately sit with the head of that environment. Obviously under her she has different layers. And within each of those layers you would expect them to link, because remember they are closer to that world. But it is the supervisor of that environment that needs to have that discussion. But, similarly, that supervisor needs to be linked to exactly what her role is by her manager. So, it filters down through the levels around exactly how it plays out. And again, it is a... I do not want to call it a 'new process'... you know. We have been on this journey now for about two... two-and-a-half years. And some people still struggle, you know.*

The management levels were very clear, and all the participants appeared to know where they **fit into the strategy-management process**. There was a clear reluctance from six out of thirteen employees (46 %) to place themselves on the “formulation” side of the strategy process. This was more evident with the junior staff members.

The value of **multi-level inclusivity** was emphasised by many of the participants. Nine out of thirteen employees (69 %) wholeheartedly supported it.

5.6.10 Feedback among management levels matters for strategy translation

Constant and personal feedback was highlighted as critical in **Organisation 2**. Top management linked the perceived success in translation of the strategy to their feedback mechanisms.

PT14: *I am part of the team who agree and admit that that's the situation that we are in and who is trying to translate that to the rest of the business to say what plans we can make to achieve this survival.*

PT18: *Not setting up strategy as such, but the implementing of a strategy. That is my part of the job.*

PT20: *This participant, in particular, was able to indicate his understanding of strategy effectively from top management all the way down to lower-level management, showing the link to the translation framework.*

*That strategy then needs to filter down into the different environments like at the parent company. So, we look at what **Organisation 2** strategy is and we then put together something that supports that particular strategy. So, I would be part of the formulation of the **Organisation 2** strategy that supports the parent company strategy.*

*But, strictly speaking, if you think about it, there is only **one** strategy and it is the **parent company strategy**. What we are doing is implementation. So, we are coming up with measures and things to do around: 'How do we hit that strategy?' So, although we are putting a strategy together, it is really ultimately something that we want to do for our environment that feeds into that strategy. But, in terms of formulation at an **Organisation 2** level, I would be involved in that from a formulation perspective. So, I suppose formulation and implementation within this environment.*

The **way the strategy is handed down** was seen as critical for execution / implementation. It was indicated that context, abilities and limitations can drive how the message should be delivered and that management should not use a 'one-size-fits-all' approach when trying to land the strategy message.

PT13: *I think knowing the cognitive limitations of your sub-ordinates is paramount. Some people will look at something – and, remember, I am giving you a breakdown of the strategy in a half-hour session.*

Now we need to rely on that next level of managers, so it's not managers, the team managers to go and convey that message – to actually make that circle even smaller and smaller to say: 'Okay, but what does it mean for you the individual, you and this team? What does it mean for this team and what does it mean for you, the individual?'

How do I convey that message if I know this person is very visual – sketch the visual picture for that person. If I know this person is very theoretical, very academic, how do I sketch that? But we have a 'one-size-fits-all' type of way that we 'land' that message, or that we try to 'land' that message which is a problem.

PT14: *I suppose if we didn't have the clarity of what we needed to achieve, then our strategy would have been difficult, or more difficult to come up with.*

PT18: *I started with like little, I'll call them 'coffee dates.' Sort of to gauge where people are and also to try to determine what is going to drive them. And then from the following month I have 'one-to-ones' with them and then I need to start linking at that time the strategy to what they said they want to achieve.*

*So, if you said you want to achieve a new car... you want to buy a new car... then you need to make more sales. So, that buys into my strategy. If you said your dream is to own a holiday home... you know, you need to make more sales. So, everything boils down to **money** in the end. Some people you can give a bigger picture and they will immediately grasp it and they will put themselves in that situation. For other people you really need to boil it down to one... two... three... and it is just people, especially for a sales advisor, I mean... I have got people in my call centre that are 21-years old. They were in school two years ago: **They do not even grasp the concept of a 'strategy'**.*

PT19: *Yes, I do think so. I think to an extent if you do not, if you are not aware of the limitations of staff you are going to frustrate the process, which might lead to a 'Let us rather get an external consultant to do it.' So, I do think managers should be very aware of cognitive, but also interest, you know. If something piques a staff member's interest to really... like leverage that. I think cognitive ability... I do think managers are aware or they should be aware of it, even if it is just an indicative feel as to... you know... I think this might be above the person's 'fireplace' a bit [beyond their comprehension].*

PT11: *So, in our case, we have tried to keep it extremely simple. Probably, in some cases, too simple, but it works... I think people **'get IT'** and we spend an extraordinary amount of time to make sure that we communicate and articulate what it means for people.*

In **clarifying** the strategy, **feedback** was found to be essential for ensuring the translation of a strategy:

PT12: *We continually track and show that back to our team: we are working on this... this thing talks to profitability. If you do this, we think our lapse ratio will decrease, or our cancellation ratio will decrease, or we will have less fraud, or whatever. So, it talks back the whole time.*

Sense checking of the strategy was seen as vital and was done through feedback which was constantly mentioned as critical to the understanding of strategy as well

as a way to check if the various management levels understand the strategy, their role and what was required of them.

PT11: *So, that is how we try to do that. The “umlulu” session [name used by case organisation] is a separate mechanism we use, not only to check strategy understanding and acceptance, but also just employee engagement and general employee wellbeing and one of the outcomes of that is that, and that I do with every team of people in the **Organisation 2** business without their leader. And then I have sessions with the respective groups of leaders as well. So, Team Managers we will do together. We will do Operational Middle Management together. Support Managers together, and then the level just below the Exco together.*

But I will go through exactly the same exercise and then, on a quarterly basis, with the Executive and the level below and the Key Project Managers in the business... We also revisit strategy, strategy progress and, obviously, it's also a way for me to see whether people understand. But it's there where we sort of make tactical adjustments to what it is that we do.

PT9: *The objectives of the project are defined from the start and we will always go back to monitor, or we always go back to monitor against the lean canvas if we are delivering what we said we would deliver.*

5.6.11 Strategy is action based

In an effort to check whether or not the strategy message was **delivered accurately and received**, participants indicated that **their** specific activities need to take place.

PT13: *So, in my mind it is – you can't wait for the results to show, it's that continual monitoring once you have what you believe has landed the message... 'Where are we going?' 'What are we going to do?' 'How are we going to do it to achieve the results?'*

It's that continual monitoring and checking in with people the whole time as to... 'Are we still aligned?' and 'Should there be a change in our strategy?' 'Should we now deviate from that original plan that we have?... 'Is it necessary for us to deviate?'

PT19: *So, it is translating strategies that are all necessarily, you know... first point or one-step removed, two-steps removed from the staff necessarily. It is giving the context about not just their day-to-day, but how they would impact the rest of the organisation.*

PT21: *When we have a strategy session, we will normally first... we will take a day – actually, with my team, it took half a day.*

So, we will sit, and we will talk about the KPAs or KPIs... and we will go step-by-step through each thing that we want to achieve and what the organisation expects us to achieve.

5.6.12 Leadership matters for strategy

It was indicated that **failure to implement strategies** may, at times, be linked to a lack of context or a 'silo mentality' by leaders at the top. The leader acts as a mouthpiece for the people within the organisation and so how he/she does things and how he/she delivers the strategy message matters.

PT11: *Two primary reasons for failure could be that it's sort of theoretical or academic.*

So, people can't relate to what it wants to achieve, nor can they see their roles, or the functions that they are responsible for or the jobs that they do in that. So, there is no connection.

And then the second is if strategy is entirely 'sort of developed' in isolation.

PT17: *There are a lot of times that I did not understand a word they said, and I had to break it down to understand the story otherwise it is just difficult.*

PT9: *It is not understanding or not... not having a grasp of exactly what the efforts are to implement the strategy. So, without an in-depth understanding of systems, processes, procedures... all of these things, you can have a fantastic strategy on paper. When it comes to putting it into practice and, if you have not done that homework, then I doubt it would ever succeed. I think management and attitude towards strategies play a very important role in how they are prioritised as well.*

Another key observation was made by **PT19** who indicated that **reliance on external experts** may not always be good as it hinders internal strategy reception.

PT19: *There is a healthy balance to be held between external analysis and, if you are able, or if you have the resources to have some kind of internal view as well. My exposure has really been to segments where there is no internal knowledge. So, we do rely, or we have relied in the past, on external consultants... you know, maybe some rise in the market, looking at some of the trends. But a lot of it is subjective, which is also... you know there is a bit of scepticism that you have to apply, because... in the end, a consultant also wants to sell their work. So, it is tough. I think it is difficult.*

In terms of 'strategy'... if we just had to look at the existing business, just trying to find its way, I do think that sometimes corporates or businesses rely on consultants to tell them what they already know and, for some reason, that adds more weight. I do not know why. You pay a lot of money to be told what you already know. And then it has some higher level of credibility than it would have had if it was generated internally. I do not necessarily think that is always the case, but I do think that happens quite often.

PT20 indicates that owing to a lack of understanding of the concept 'strategy', there is often a **level of reluctance or a lack of motivation** to become involved.

PT20: *I think it is a concept that is over-used. I think it is a word that everybody uses who loves to make themselves come across as very important. And, quite frankly, I think 'strategy' has lost its value over time. So, every time people say the word 'strategy', I kind of get into: 'Oh yes, what are we talking about again now?' And that is my view, because I really think that what people refer to as 'strategy' is really just a big word for: 'Let us go and sit and think for hours of how **not** to implement something.'*

Most top- and middle-management highlighted the **importance of leading by example** as opposed to giving instructions to staff.

PT11: *A big part of your role is then further to – I suppose the first one of unlocking potential is to create an environment where people will be successful and that speaks to really setting the correct example as a leader and understanding the role that you play in 'How culture develops in the business.'*

*So, I think I may have used one of my favourite Emerson quotes yesterday: 'What you do is so **loud** I cannot hear what you are saying.'*

PT19: *One of the connotations attached to strategy is 'pie-in-the-sky' kind of stuff.*

Resistance to a leader may also be a barrier to translation of strategy, due to a lack of connection established by staff to the leader.

PT11: *So, our previous CEO, although I worked with him for many years and I respect him... I mean he is a brilliant person. I don't think he is a 'people connector' and I don't think people felt very close to him as a leader. So, maybe brilliance and academics and whatever do not resonate with all people.*

The **method of delivery** of a strategy message by a leader matters to employees. One participant pointed out that when top management engages with everyone, it gives a renewed sense of purpose to many staff members.

PT9: *But there is value in how he 'gives' it and how he 'translates the message' and you just walk out of there feeling:... 'You know, I have got a part to play in this and I can potentially make a bit of a difference here'... I do not think we should downplay that element as well.*

In the same vein **PT12** points out that it is key to **make sure the strategy is easy** to understand.

PT12: *Yes, making it less academic, more tangible, more understandable... yes, 'tangible' is a good word.*

This was echoed by **PT16** who indicated **importance of buy-in** and of **conviction of strategy**, which is often driven by the leader or by top management.

PT16: *If I think of the **first one**... was how committed the entire Exco team was to that strategy, because they were all present and they all sort of backed each other up, so that was the first bit.*

*The **second one** was... I found it easier to convince someone of something if I have been convinced of it. So, because they made such a good job of convincing everyone else about the strategy with all the research that had been done and why they were formulating this plan and why the targets are set the way they are... it made it easier for me to pass the message on because I believed in it.*

5.6.13 Culture plays a role in the translation of strategy

'Culture' was considered as either an enabler or a barrier to strategy and it guides how people do things within an organisation.

PT13: *Culture comes through very, very strongly. Whereas culture in our environment is an enabler, it is not a strategic objective.*

PT19: *And I think depending on exactly what the corporate culture is, a lot of it gets stuck there. You know, a manager does not necessarily want to spend time on taking that bullet.*

"Unpacking" it, making it, you know... a bit more "visual".

Doing a bit of a 'roadmap' for his staff. You know, defining specific milestones and again plotting that out on a bit of a roadmap.

Or doing a 'stakeholder analysis' a bit to say... 'You know you are going to interact with these stakeholders... Be aware that these are their objectives.'

PT22: *What are our enablers, culture – those enablers have been constant the whole time. So, that consistency and the fact that we talk about it, we hear it, we see it because we have got an infographic. So, they 'see' and they 'hear' the strategy... and in various mediums.*

Participants indicated that at times **management speaks at** people and not **to** people regarding strategy.

PT13: *I had these strategic days where I invited just my three heads and I wonder sometimes if it's a control thing or what, because you sometimes don't see the message 'landing'.*

PT19: *The ways. So, I do think it is about putting effort into translating it a bit... making it relevant. Making it a bit more personal to your team. I think that is very key and you get great examples of that as well.*

*There are managers who go out of their way to make the team feel really like they are the **'owners'** of the strategy'. So, you know... this part of the overall strategy plays out 90 % in our team. Let us **own** it. You know, we can call it something else. We can give it our own **little catch phrase** and give it a theme, you know.*

*Is it a **soccer** theme? Right. We will, you know always give our best when we are on the 'pitch' [field] or... whatever like that. So, there are managers who do that really well and I think that is when you get good buy-in from the team.*

PT22: *So, we came from a bottom-up influence and I would go, and I will go and source information... I will lobby with the Manco and the Exco ahead of time. But, eventually, the conversation is an Exco decision. 'What is going to make this business tick?' And I always think... 'Half a day spent... nearly a full day spent, and they were doing this against what?'*

So, in terms of that multi-level inclusivity, there should not be a misalignment of management when it comes to sitting and making decisions. That's where I think the XXY strategy is not very clearly filtered down to, say, a business unit.

PT12: *Indicates that, in sending a message, one must use a variety of tools that speak to everyone.*

So, I don't know who the specific person is... There is no way that I would know what someone takes in by hearing. So, what I do is I try to have the engagement that we have in terms of what needs to be delivered.

So, if I say to you: 'We have to get to 3 000 sales.' I will say it, but I will put up posters everywhere so you can see 'it'... We will send out updates so that you can see 'it'... and we will have a meeting where you can take down notes, as an example. So, it's to touch all three of those senses, because you don't really know how each person takes in [assimilates] information.

5.6.14 Making strategy visible

'Visibility' of the strategy appears to matter for its absorption. All the participants indicated that, to make sure that the strategy 'sticks', it has to be 'visible'. They indicated that it was on posters all over the office and on company merchandise, so that people are constantly reminded of the strategy.

PT12: *Everything can be pulled back to the same thing. And we use our infographics that were developed for **Organisation 2** and that thing... everybody has got one on their table, everything we discuss talks to that. So, that's continual reinforcement... I mean you can close your eyes and you can see it.*

PT21: *In terms of how to translate it I mean our strategy is very visible internally for everyone – I mean you can see it when you walk in here, you can walk with me I will show you our strategy, it's on the wall. When you go to the toilet every day, you see the strategy, etcetera. So, that's one of the key things I think that we do well here is to make sure that it remains visible.*

PT20: *For us, by making it visible, it is a way of connecting people to it. They see that this is what we are working towards. Every single day when you walk in here, this... So, you will see also there are people who are wearing shirts that say: "**Count us in**".*

PT23: *A simplified infographic is displayed for all to see to ensure that everyone can comprehend what is at stake.*

For many, it appeared as though, by following the strategy sessions, they not only understood, but believed in the strategy and understood what it meant for them as employees.

PT12: *If I answer this question in terms of **Organisation 2** and how I think people perceive it, I think they are extremely positive and I think they believe in it. And I think they know... I don't think they know everything by heart, but I think they '**connect**' to something in the strategy. So, I think I would say: 'For the majority in the bigger team, **they are really immersed in strategy**', or '**strategy is ingrained in their...**' Yes, it is somewhere 'landed' in them.*

PT16, in particular, mentioned that the **specific method of delivery made him relate to the strategy on a very personal level.**

PT16: *What worked really well for me was: It wasn't just them sitting up on a stage and doing a presentation and we had to listen. They had... the CEO gave a presentation or context for the meeting and then they had the different Exco members sitting at each table and the tables had the groups of different managers, sort of explain what they meant by the strategy and the three-year plan and we could then ask questions around the strategy and how you could contribute to that. That, for me, worked really well, because then you almost felt like you were getting a personalised message.*

5.7 SURVEY FINDINGS: ORGANISATION 2 (SECONDARY DATA SOURCE 2)

Once all the various initiatives promoting the strategy were undertaken in **Organisation 2**, an internal survey was conducted among the various managerial levels in and by the company. This internal survey was aimed at evaluating whether or not the transferred strategy message had 'landed' as intended. The survey results, presentation slides and content used during the engagement sessions were made available to the researcher upon request (**Appendices O** and **P**). The variety of sources afforded the researcher the opportunity to cross-reference as well as increase the trustworthiness of the data.

The presence of an internal survey from **Organisation 2** was made known to the researcher during the primary data collection when one of the participants indicated that an internal survey had been conducted a month prior to the interviews. The survey offered an opportunistic use of available data and was highly beneficial as it might validate or corroborate what the participants said in the interviews and it would enable the researcher to see clearly whether or not the intended strategy message is what was translated.

It bears highlighting that, at the point of primary data collection, the company had just completed strategy sessions. This greatly assisted in data collection because the message was still "fresh" in the minds of the participants. While extremely useful for informing the study, the researcher notes that this could have, in some way, influenced 'sense reception'. This is beneficial to the present study because of the potential inputs and verification.

The participants appeared to have a great understanding of the company's strategy and could readily remember what the 'strategy' entailed. They kept referring back to the 'recently completed initiatives' and could recall and re-tell the 'story' of the re-introduced strategy.

The survey findings gave insight into how the employees perceived and, to a certain extent, received sense. Several questions were put forward to the employees regarding the strategy.

The nature or method in which the questions were asked was, in some instances, judged as biased and seemed to limit the opportunity for honest feedback. There were reservations from a research perspective. Thus, the interpretation thereof was done with caution. For example, the question: 'Can we count on you to move the strategy forward?' is an example of biased questioning.

The alternative would be seen as negative and offered participants no space to say 'maybe' or 'no' or to portray conditions of their 'buy-in'. That said, the survey provided some feedback (of a qualitative nature) that could be useful to inform and potentially improve the research sense-making process.

Table 5.3: Summary of findings from the survey obtained from Organisation 2

Questions:	Did your leader discuss the key messages with your team regarding the XX strategy/scorecard?	I can see a clear link between what I do at work and the XX strategic goals and objectives.	Tell us in one sentence how you will contribute in your world of work to reach our XX objective:	Can we count you in to ensure that XX reaches our XX objectives?	If you have any questions regarding the strategy or requiring additional information please comment below:
Responses:	<p>Yes: 94 %</p> <p>No: 6 %</p>	<p>Yes: 90 %</p> <p>No: 10 %</p>	<ol style="list-style-type: none"> 1. Make sure projects make clients happy. 2. Deliver targets. 3. Ensure teamwork. 4. Enable others. 5. Focus on improving reach. 6. Be the best business. 7. Achieve targets. 	<p>Yes: 100 %</p>	<p>Requests only (no questions):</p> <ol style="list-style-type: none"> 1. Additional information (to be discussed with line manager). 2. Creation of more development opportunities. 3. Improve visibility in the market. 4. Needs better clarity on specific objectives and how they contributes/impacts business. 5. Better understand impact of unmet targets. 6. To be reminded of the strategy on a monthly basis so as to maintain focus.
<p>Source: Own compilation based on survey results from Organisation 2.</p>					

Sixty individuals participated in the internal survey. They included the various management levels but were not categorically placed in the survey. **Table 5.3** gives an indication of the summarised survey results. The company name as well as project names have been replaced with **Organisation 2** to protect the anonymity of the organisation. The survey (**Appendix O**) was more qualitative in nature as it asked specific questions and the participants answered in sentence format. These are discussed in further detail in the next section. The results were also presented in graph format (**Appendix P**) to gain a more diagrammatic representation.

5.8 FRAMEWORK VALIDATION

A 'conceptual framework' was developed from the literature, namely: the 'strategy translation interface' (framework) (**Figure 3.2**). The strategy translation interface (framework) as well as 'sense reception' has several concepts related to it. During the interview process, the researcher searched for and observed the presence of those elements.

The **five** elements of 'sense reception' (literature based) were borne in mind during the interview process. To determine the presence of these elements, the researcher used two methods of investigation. The **first** was to listen and identify the elements embedded in the responses.

In the event that the embedded elements did not materialise or were less obvious, the researcher used the **second** method of investigation which was probing for them, by asking direct questions regarding each of the elements. For instance, "Do you think it is important for managers to believe in the strategy prior to implementation?" [tests for potential buy-in].

Table 5.4 reflects the searching and observation results of the elements of 'sense reception'. Each element is stated in the first row. The participants are all reflected in the first column by means of a code (**PT1 = Participant 1**), the confirmatory 'ticks' below the element, but next to the participants, indicate whether or not the elements were recognised by the researcher *during the interview* and, as such, linked to 'strategy comprehension' and 'translation of strategy'.

As indicated, the participants either voluntarily mentioned the elements of 'sense reception' (without prompting) while answering questions or acknowledged each concept's existence and importance, when asked (probed) directly about it. **Table 5.4**

does not make a distinction between probed and embedded elements as there were instances (per participant) where the elements would be embedded in the response and instances where the researcher probed. **Participants 7, 8, 9 and 10** were not tested as they each gave a presentation and there was minimal engagement between them and the researcher on the reception elements specifically.

Table 5.4: Presence of sense reception elements checked during the interview

Participant	Buy-in	Personalisation of the strategy (receiver's personal meaning making)	Unique application (contextual)	Modified enactment	Accurate (renditioning) of the strategy
PT1	✓	✓	✓	✓	✓
PT2	✓	✓	✓	✓	✓
PT3	✓	✓	✓	✓	✓
PT4	✓	✓	✓	✓	✓
PT5	✓	✓	✓	✓	✓
PT6	✓	✓	✓	✓	✓
PT7					
PT8					
PT9					
PT10					
PT11	✓	✓	✓	✓	✓
PT12	✓	✓	✓	✓	✓
PT13	✓	✓	✓	✓	✓
PT14	✓	✓	✓	✓	✓
PT15	✓	✓	✓	✓	✓
PT16	✓	✓	✓	✓	✓
PT17	✓	✓	✓	✓	✓
PT18	✓	✓	✓	✓	✓
PT19	✓	✓	✓	✓	✓
PT20	✓	✓	✓	✓	✓
PT21	✓	✓	✓	✓	✓
PT22	✓	✓	✓	✓	✓
PT23	✓	✓	✓	✓	✓

Source: Own compilation.

5.9 LINKING THE FINAL THEMES

The final themes selected from the ‘inductively’ and ‘deductively’ developed themes will be discussed in detail in the section that follows. These themes are presented graphically in **Figures 5.2** and **5.3**. The inductive themes individually form part of the strategy translation framework, while deductive themes were developed from the primary data. In **Table 5.5**, the themes are named and explained. These themes are then linked either to ‘sense making’ or ‘sense reception’. It is then indicated whether or not they are seen as an ‘enabler’, or a ‘distractor’ to translation. A final indication is made as to whether the themes are experienced ‘externally’ or ‘internally’ by the participants. The themes are interrogated and elaborated upon in **Chapter 6**.

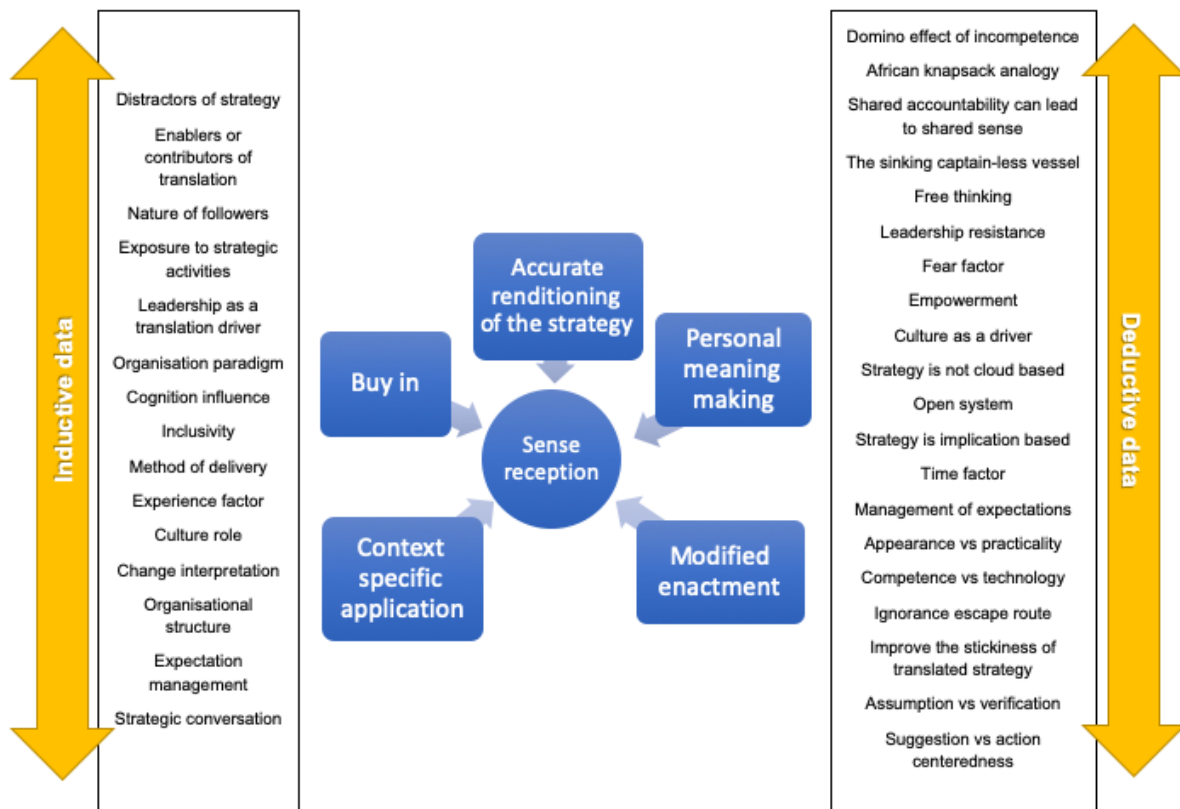


Figure 5.2: Inductive and deductive themes (developed from codes)

Source: Own compilation.

Table 5.5: Interrogating the final themes to determine the source and link to sense making and sense reception

Theme	Explanation	Exogenous	Endogenous	Distractor	Enabler	Function of Sense Giver	Function of Sense Receiver
Distractors of strategy	Anything can drive attention away from understanding or translation of a strategy.	√	√	√		√	√
Enablers or contributors of translation	Anything that allows more effective translation of a strategy or that contributes to better translation of a strategy.	√	√		√	√	√
Leadership as a translation driver	Leaders allow involvement and they are able to perform activities that enable better translation.				√	√	

Theme	Explanation	Exogenous	Endogenous	Distractor	Enabler	Function of Sense Giver	Function of Sense Receiver
Nature of followers	<p>The more receptive and willing the follower is, the greater the chance of attempted strategy translation. The more unwilling or resistant the follower, the harder it can be to translate.</p> <p>The cognitive limitations and abilities of the follower should also be considered when translating strategy.</p>		√	√	√		√
Exposure to strategic activities	<p>Exposure to strategy allows the managers to understand the participant involved in strategy.</p> <p>Do they have an opportunity to participate in the strategy-management process?</p>	√				√	√

Theme	Explanation	Exogenous	Endogenous	Distractor	Enabler	Function of Sense Giver	Function of Sense Receiver
Organisation paradigm	The way the organisational hierarchy is set out and how decisions are made.	√		√	√		
Cognition influence	The way an individual's cognition affects how they see things.		√	√	√	√	√
Inclusivity	Whether the organisation has an inclusive culture.	√	√			√	
Method of delivery	The way strategy is delivered.	√		√	√	√	
Experience factor	The experience level of the individual (number of years).		√	√	√	√	√
Culture role	The manner in which culture drives the way things are done in the organisation.	√		√	√		

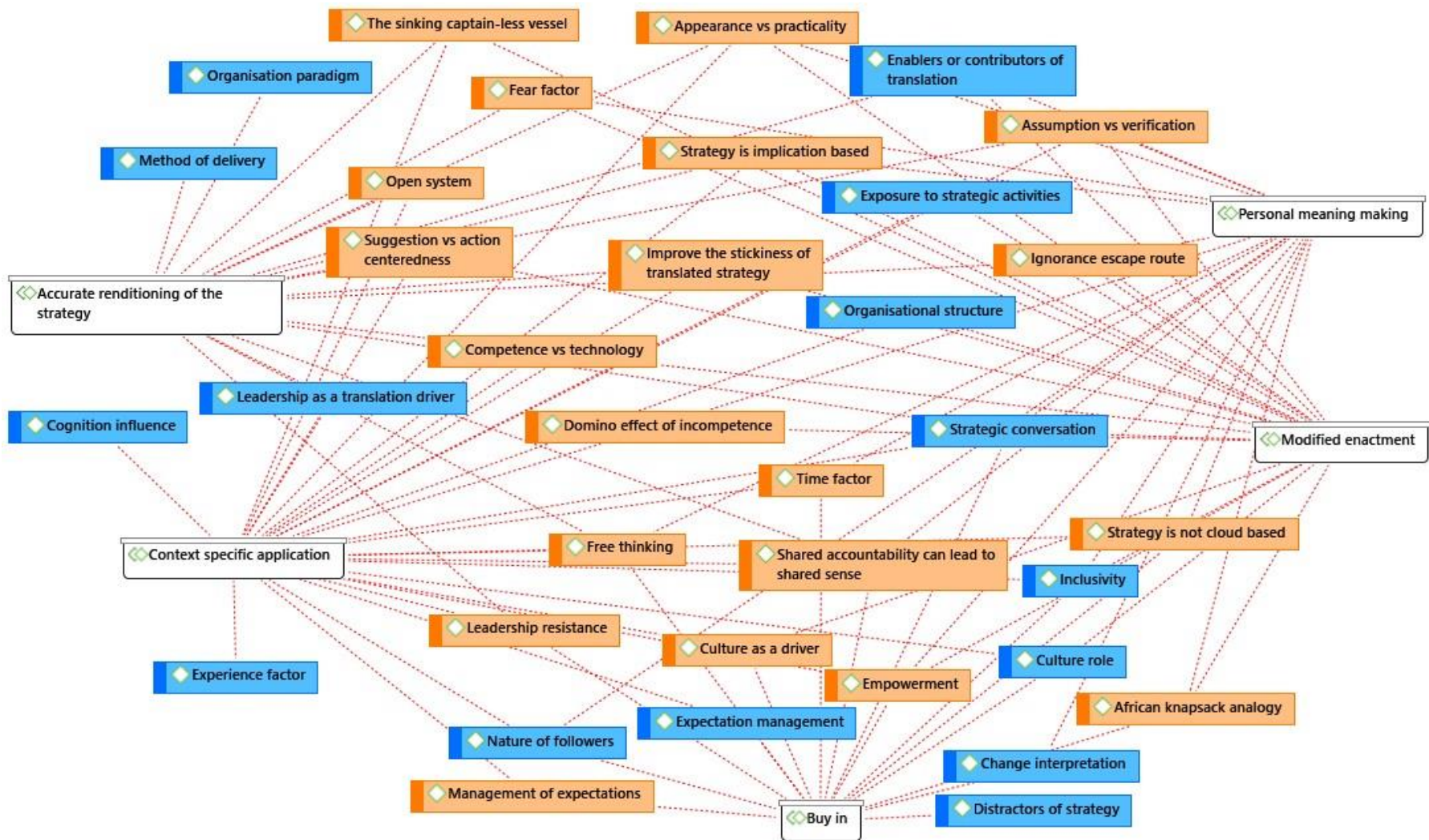


Figure 5.3: Coded themes linked to sense-reception elements (mind map)

Source: Own compilation.

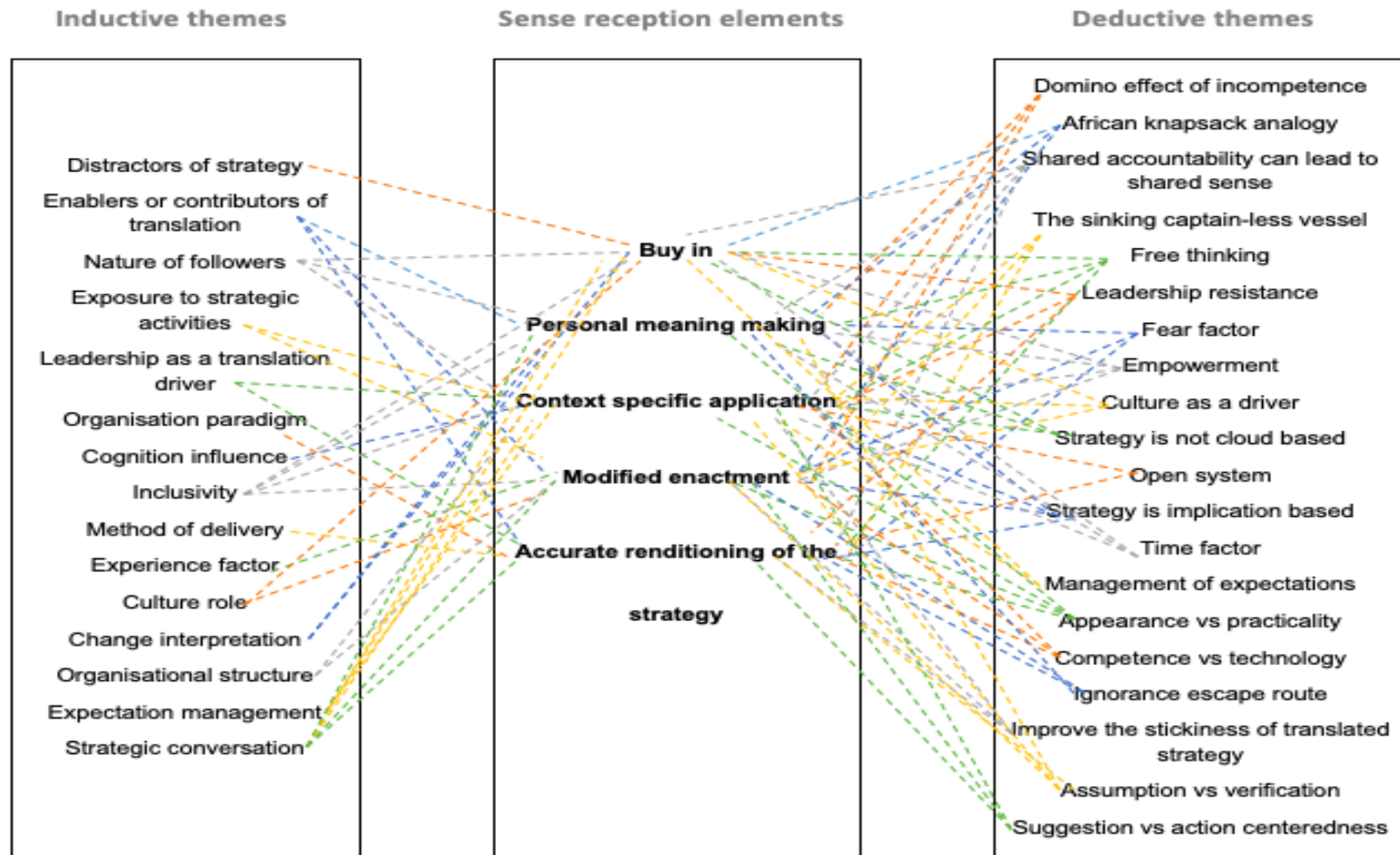


Figure 5.4: Coded themes linked to sense-reception elements (diagram)

Source: Own compilation.

Figure 5.4 is an expansion on **Figures 5.2** and **5.3** and shows how each of the themes relates to the elements of 'sense reception' in a non-chronological or hierarchical way.

5.10 CHAPTER SUMMARY

Chapter 5 introduced the case organisations used in the study and introduced some findings from the secondary and primary data. Each type and method of data collection was discussed and the subject demographics introduced. The findings from the primary data collection will be discussed in **Chapter 6**.

CHAPTER 6: DISCUSSION OF FINDINGS

6.1 INTRODUCTION

This chapter discusses the most important findings and proposed conclusions of the study and supplements them with some existing related literature on strategy translation in organisations. **Chapter 5** provided in-depth data analysis on the state of strategy understanding and practices of two South African organisations. It addressed managers' perceptual barriers and enablers of strategy and the translation thereof. The goal of this chapter is to understand the applicability of these findings, relative to previous research.

While deductive codes (informed by the developed sense-reception concept) and the framework existed prior to the interviews, the researcher did not have preconceived notions or ideas regarding what the study would reveal. The documentation analysed before the interview process provided some insight into **Organisation 1** and **Organisation 2** but did not offer answers for the strategy-translation process or the practicality of sense reception. The aim of the study was to investigate and understand how strategy was perceived and understood by individuals, how sense reception played a role in strategy translation within the organisation as well as to learn whether or not tools existed to enhance the translation of the strategy between the various management levels.

Based on the literature, the sense-reception concept and the developed strategy-translation interface framework, several propositions were brought forward. The findings indicated that there was support for all six propositions.

6.2 PROPOSITIONS DEVELOPED AND SUPPORTED

The following **six propositions** were developed from the research and supported by the findings:

P1: Communication failure is an attribution of insufficient “causality” for poor strategy implementation.

P2: Buy-in (engagement) is a key antecedent of enhanced sense reception in strategy translation.

P3: Personalised meaning making by the receiver is a key antecedent of enhanced sense reception in strategy translation.

P4: Context-specific application is an antecedent of enhanced sense reception in strategy translation.

P5: Modified enactment informs the level of sense reception in strategy translation.

P6: Ability to rendition the strategy accurately will confirm enhanced sense reception in strategy translation.

A further **four propositions** came about as a result of the analysis of the data collected. These are discussed in this chapter in relation to the final themes. These propositions were developed from the empirical data and during data collection, the framework was used (See Table 5.4). The propositions thus support the conceptual model of the study.

6.3 RESEARCH QUESTIONS REVISITED

As indicated in **Table 4.2**, the study sought to answer the following **four** main research questions:

1. Is 'sense reception' a plausible concept?

2. What is the relationship between 'sense reception' and 'strategy translation'?

3. What informs the existence of 'sense reception' during 'strategy translation'?

4. How can the proposed 'sense framework' address 'effective translation' across the management hierarchy?

These questions were informed by previous literature on 'strategy practices' as well as 'sense literature'. The next section in this chapter discusses the most substantial findings from the study and the conclusions drawn from these findings.

6.4 DISCUSSION AND SEARCH FOR SIGNIFICANT FINDINGS

The assessment of two case organisations, both through primary- and secondary-data collection, provided insight into the practices, processes and procedures used by managers to enable 'strategy translation' within their respective organisations (**Organisation 1** and **Organisation 2**). Data collected were analysed and core themes developed to address the research questions brought forward by the study.

The following key findings were found in the study and propositions developed:

6.4.1 Reception elements from the top-management perspective

At this point many similarities were found between the two case organisations and it was found useful to compare responses from the two CEOs to determine their experience and views relating to the sense-reception elements. This was done to further inform us on the plausibility of sense reception as a concept. **Table 6.1** shows the perception of each CEO in relation to the sense-reception elements and summarises the conclusion drawn from each finding.

Table 6.1: Comparison of perception of CEOs of sense reception elements

Reception Element	Organisation 1 CEO Quotations	Organisation 2 CEO Quotations	Conclusion
Buy-in of strategy	Sometimes you have no choice but to take the road leading in a specific direction.	<p>We monitor not only to check strategy understanding and acceptance, but also just employee engagement and general employee wellbeing and one of the outcomes of that is that and I do that with every team of people in the business without their leader.</p> <p>There are no secrets, they sit through the entire agenda, they are confronted with everything, and we rotate them so that everybody has an opportunity. So, that gives them a slightly different perspective and, for many of them, their insight after attending their first Exco meeting is: "Okay, so this is quite different to what we are used to, there's a lot of challenging, the nature of the discussions is very different."</p>	Inclusivity can enable buy-in.
Personalisation of the strategy (receiver's Personal meaning making)	<p>How do we take people, teach them to fish and they can think for themselves, and they run a business themselves?</p> <p>That is real empowerment, not where you sort of say: "Okay, I am just going to put you on my board" or "I am just going to move you around about. No."</p> <p>You then have to create the environment that they understand.</p>	<p>It must be more than theoretical or academic. So, people can't relate to what it wants to achieve, nor can they if they don't see their roles, or the functions that they are responsible for or the jobs that they do in that, so there is no connection.</p> <p>People can connect to what it is that you want to do, they can see themselves in there and they contribute and then involve themselves in the process.</p>	When people feel empowered and understand they can make better sense of the strategy.

Reception Element	Organisation 1 CEO Quotations	Organisation 2 CEO Quotations	Conclusion
Contextual-specific application	So, they already have an academic base. Okay, now they need opportunities. So, let us create opportunities, but in real life.	Providing direction means that you start the process, given your context and your accountability, but it also means that you don't disregard the wisdom that is in the business and that you, at appropriate intervals, involve the necessary sort of broader collection of leaders and/or employees where it is appropriate.	Strategy must be made practical for employees to know and understand how to implement it.
Modified enactment	<p>Just say: "That is your road, check those things, see if you can improve."</p> <p>Ingredients are important but if you just have ingredients and you do not know the method you are never going to.</p>	It is important that our guys understand our business' strategy, because they are fully accountable, obviously, for delivering it.	Once the thinking behind the strategy changes and the understanding improves, people may change their actions to allow for improved implementation.
Accurate renditioning	<p>Say: "Here is your chance. Let us see what happens." They must not be broken by it.</p> <p>Say: "Okay, no. Let us adapt the level so that you can work it."</p> <p>This is why we throw these students what they come out with in most of the cases... some of them we had to retract a little bit, pull back a bit.</p>	Then we try to equip the leaders with a story. We employ story-telling tools so that when they then take responsibility for articulating their part of the strategy in their respective teams or areas, they can also use story-telling as the mechanism.	The ability to re-tell the story of the strategy can reflect an understanding or lack of understanding of a strategy.

6.4.2 The intricacy of the “senses” on strategy translation

While the interviews were guided by an interview protocol, they maintained a narrative approach, as the participants were encouraged to tell their story. In **Organisation 1** and **Organisation 2**, the **first participant** was the CEO (top management). This sequence allowed the researcher to hear and understand from their perspective how they make sense of the strategy and how they translate, give sense and create meaning for themselves and others. The interviews that followed were with the middle- and lower-level managers.

Through the chosen sequence, the researcher could determine whether or not the “assumed” sense given and meaning made was in fact what was intended by the sense giver.

The goal was to observe whether the same message was actually carried down or whether there were differences in understanding of the message and to find out how this difference was accounted for. There is specific jargon related to a specific field and strategy appears no different in that sense (Astley & Zammuto, 1992).

The findings show that sense making and sense giving can both happen but may, in some instances, contribute to *inaccurate* reception and may even result in non-delivery of the strategy. Managers in the same reporting line can communicate the strategy but a lack of knowledge and feedback can lead to inaccurate sense giving (Barta & Barwise, 2017). This became evident when some of the managers were asked about basic strategy concepts such as “external analysis”. Responses given were varied and sometimes contradictory.

The sense giver who may have a clear understanding of the strategy, having made sense of external and internal information leading to the strategy may, in some instances, find no fault in his ability to give sense and, in so doing, make the assumption that the message was received. This led to the realisation that sense given is not necessarily sense received. While, at face value, the apparent confusion of managers appears to be an issue of concern (McCaskey, 1982) that the mind strives to bring order to, simplicity, consistency and stability to the world it encounters, it is reluctant to welcome ambiguity.

Thus, the paradoxical solution to ambiguity in translation of strategy is that: in order for one to make sense, ambiguity must first exist. Problems or issues addressed

intuitively are done through using tacit knowledge attained over many years of experience (Lüscher & Lewis, 2008). Based on this, it is clear that the varying levels of understanding can be expected and form part of the learning process. This was further confirmed during interviews. Most of the participants agreed that the variation of perception among management levels was not only present but, in some instances, necessary.

Top management indicated that, while variation existed, there were methods to allow employees to still be part of the 'same story'. This is supported by Brown *et al.* (2013).

During interviews, the experience of participants on the top- and middle-level of management in strategy was apparent. Owing to this experience, they appear to possess a certain level of expertise when it comes to breaking down sense for themselves and others. Middle management, in particular, needs to be adept when it comes to breaking down sense (Kaffka *et al.*, 2013). The middle manager acts as a buffer between top- and lower-level management and plays a crucial role in strategy translation.

He / she is tasked with the duty to make, take, break, and give sense while making sure that they have accurately received sense. This is particularly important when dealing with staff members who require directional or guided meaning making to do their job.

Without proper direction or guidance, staff may derive incorrect meaning from a strategy message and may, ultimately, either implement the wrong strategy or implement the right strategy incorrectly. This echoes the findings of Rom (2019) and Lane *et al.* (2001). When asked whether they had ever gone against direct orders during implementation, if they felt it was the right thing to do, many participants said: "Yes". A variety of reasons was given, with the most dominant ones indicating that:

1. Directive would sometimes be given with no consideration for its practical application,
2. Implementers would not be consulted when decisions were being made,
3. Experience on the implementer's side often meant they knew how to do things "right",
4. People did not agree with the leader's way of doing things,

5. People had little faith in the leadership and its abilities, and
6. Delays or time constraints in making a decision could sometimes lead to loss of clients and thus reduced profit(s).

The above comments highlight the importance of feedback (which can act as a directive for offering guidance) and the need for organisations to work on developing a shared sense of the strategy and its implementation plans. Several authors (for example, Barta & Barwise, 2017; Fenton & Langley, 2011; Fiss & Zajac, 2006; Brady, Davies & Gann, 2005) have pointed out the significance of feedback as a tool for learning, growth and knowledge transfer.

The fear associated with strategy was observed to exist. In some instances, the mere mention of the word 'strategy' tended to render some people confused and apprehensive. To interrogate the level of awareness surrounding an organisation's strategy is essentially to question whether or not people understand the core reason for an organisation's existence. Interviews showed that what others found to be 'common knowledge' eluded some which, to my understanding, indicates the lack of 'common sense' about strategy that can exist within an organisation. Through understanding whether or not the message was received, managers can begin to develop strategy 'common sense' and attempt to reduce fear of the concept strategy (Clarke, Pruyne & Hodgkinson, 2006). What is more, findings indicate that mistakes should not be seen as a deterrent but rather a catalyst to learning and development, especially among junior staff members. This is in line with what Jabbar and Wali (2021) found as far as organisational learning is concerned. This may address reduce the fear of failure and allow people to learn from their mistakes.

6.4.3 Strategy and structure in translation

The organisational hierarchy was found to play some role in the perception of how strategy is communicated and transferred (Lowe, Rod & Hwang, 2016). Participants who were in the organisation with a flat structure, indicated that they felt that an organisation with too steep a hierarchy prevents strategy translation from happening.

The view that only open and flatter structures with no designated communication 'methodologies' or platforms result in effective translation was vocalised repeatedly.

It is interesting to note that this perception was unknowingly challenged by the participants in the organisation with a steep hierarchy. Those who worked in an

organisation with clearly designated levels indicated that, as long as measures were set in place to allow the communication and translation of a strategy, there is no need to do away with hierarchy. In fact, the nature of some followers seems to be dependent on being led, particularly if they are dealing with the unknown. This dependence on leaders to give directive may indicate that the way in which leaders, top- or middle-management make and give sense may influence the organisation's ability to develop and use shared sense. As indicated by Pajela, Roberts and Brenner (2020), one may have to customise sense for another and this is done by addressing the receiver's ability to create accurate meaning from the strategy sense given to them. Without accurately addressing how people receive sense, the gap in translation may persist.

The following proposition was developed as result of investigating the linkages between the various senses and strategy translation.

P7: Sense reception is moderated by the relationship between 'sense making', 'sense giving' and 'strategy translation'.

6.4.4 The relevance of feedback and inclusivity in strategy translation

It was shown continually that there is an apparent difference in how the various levels of management make sense. Cues used to make sense of a situation vary in accordance with the experience level of the managers, individual ability as well as a pre-existing knowledge base (Mróz, 2020; Bazerman, 1990; Tversky & Kahneman, 1986). The gap in knowledge and the ability to use the appropriate information when making sense of a strategy can, in some cases, be filled only by other management levels. What is key to understand is that the "gap" cannot be not filled only by one level of management and is related mainly to the type of gap in existence. During the interviews, two types of gaps were found to exist when it comes to understanding certain elements that make up the strategic management process:

1. the knowledge gap, and
2. the operational gap.

The 'knowledge gap' speaks to cognition and is linked to abstract knowledge regarding strategy as a whole as well as that which drives the organisation. This gap is typically addressed by the supervisor or someone at a higher level in terms of the

organisational hierarchy and generally follows a top-down approach. Those at a higher level of the hierarchy are required to generate meaning from the information at hand, give sense to their sub-ordinates and, in so doing, create meaning for them (Chu, 2021; Tan *et al.*, 2020; Suthers, 2006).

It is, therefore, critical that the manager who makes meaning for another fully understands and knows where the gaps in understanding lie. Knowing this may aid in the customisation of a message for that specific individual and, if that is done, the message can be clarified for the individual receiving it. A manager who is not clear on what the cognitive abilities or limitations of the receiver are, automatically limits the sense given, meaning made, sense received and the translation of a strategy.

These limitations can lead to double-edged assumptions which may hinder strategy translation. From the data collected, the researcher was able to identify how assumptions linked to knowledge can impair the process of translation. When an assumption is made that knowledge exists when it does not, it can lead to mistakes in application. In contrast, findings show that assuming a lack of knowledge when knowledge exists can lead to dis-engagement of staff members who may feel undermined and perhaps even uninspired to perform (Chu, 2021; Tan *et al.*, 2020; Suthers, 2006).

Operational gaps often exist mainly as a result of poor feedback and communication among management levels. Many of the middle- and lower-level managers attributed ineffective strategy implementation to top managers who set plans without understanding how things work at 'ground level' (Sharma & Good, 2013; Rouleau & Balogun, 2010; Rouleau, 2005). In contrast with the knowledge gaps, operational gaps were shown to typically follow a bottom-up approach. I propose that, for the gaps to be addressed thoroughly, both approaches need not be unidirectional (either top-down or bottom-up) but rather that the feedback-loop approach be followed.

The rate of constant and consistent feedback was cited as a way to remove the need for constant monitoring and removed some pressure from mentors and supervisors. This was a key confirmation of the need for a feedback loop during strategy translation. This is a noteworthy consideration as it was found that 76 % of senior executives from twenty countries cited the lack of employee interaction and collaboration as one of the biggest barriers to their long-term success (Reynolds & Lewis, 2017). What is clear is that if managers do not follow up on whether or not

sense has been given accurately and, in turn, received, the gap in comprehension (and perhaps implementation of the strategy) may remain.

The feedback loop could thus be key to narrowing the gaps. Top management is advised to engage with employees on the lower levels to ensure that their plans make practical sense and have the potential of “enactment”, meaning the plans formulated should have clear action plans in place. This can, in many cases, be informed only by the lower level or the operationally-based employees. Lower-level and middle-level employees may, in turn, become receptive to plans and directives from top management.

A dominant theme across all interviews and management levels was that of multilevel inclusivity, with many participants indicating the critical need thereof and stating that it would aid the translation process because they would have a say in the strategy and be informed during the process. This is directly linked to the ‘line-of-sight theory’ (Boswell, Bingham & Colvin, 2006) as it showed that employees place value on knowing the role they play in the organisation and how they fit into the implementation of strategy.

6.4.5 Doing away with uni-directional feedback in strategy translation

Strategy is an ongoing process that cannot be considered “completed” at only one point with the assumption that the strategy message will ‘stick’. Participants in both organisations indicated that they held periodic meetings with either sub-ordinates or supervisors to discuss the strategy and clarify how it fits into their jobs. In some cases, however, it was indicated that meetings were more about reporting back on work done and meetings that were more centred around the daily tasks and expectations. While regular meetings and feedback are essential, managers need to be wary of conducting meetings without a strategic focus as it may lead to operationally-driven employees who are unable to align the strategy to their work (Jarzabkowski & Seidl, 2008).

Participants in **Organisation 2** revealed that the general lack of knowledge surrounding their strategy was a weakness and thus saw the need to re-formulate the strategy and re-energise employees. An initiative was taken to build on or improve the knowledge of all employees about the strategy of the organisation. This initiative, which used story-telling as tool to translate strategy, allowed for the development of

shared understanding and re-affirmation of the strategy across various disciplines and management levels.

Employees reported that this initiative brought them closer to each other and allowed them to see where they fit in. Feedback was a key driver of this initiative because, in order for the process to work, there was a need for constant and consistent feedback among the various management levels. This allowed managers to assess their own as well as others' cognitive abilities and knowledge regarding the strategy of the organisation.

Through the use of the 'feedback loop', key gaps in the strategy were highlighted and any wrong assumptions were addressed because of the constant communication and validation of knowledge and information. The feedback loop has many advantages for strategy translation. It allows for learning and accurate interpretation. It aims to do away with ignorance as it offers a platform for top management to re-state the strategy and strategy plans while addressing any inconsistencies in understanding or learning. The assumptions made included, but were not limited to:

- Assuming that management does not care to listen.
- There is no point to learning or understanding strategy if top management sets unfeasible or unactionable plans.
- Assuming that people understand the strategy and will be able to act accordingly (action what they have learnt).

The feedback loop is once again proposed as a solution to close or lessen the cognitive gaps of both knowledge and operations. It does away with the hierarchy barriers as it fosters communication and understanding among the various management levels (Pirolli & Card, 2005). In using the feedback loop when translating a strategy, management is able to be proactive and not reactive in problem solving as they deal with issues in real-time, albeit retrospectively at times. This led to the following proposition:

P8:	The feedback-sensing loop moderates sense reception and enhances strategy translation.
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6.4.6 Strategy translation tools

As indicated, sense givers can mistakenly assume that they have delivered the strategy message effectively and this misconception can lead to issues associated with poor implementation.

The question of “how” a strategy is communicated and eventually translated is a critical one. When asked how they determined whether or not a strategy was translated, participants in **Organisation 1** and **Organisation 2** indicated that there were certain things to look out for. These are ability to show understanding of the strategy by:

1. acting independently,
2. showing the ability to apply the strategy to their own jobs,
3. showing the ability to lead others, and
4. showing the ability to correctly teach or translate the strategy in their own way.

Several tools were identified to translate strategy. An interesting finding came about during the interviews with participants from **Organisation 2**. The initiative taken to reformulate and “re-teach” strategy was actioned in a very interesting way. **Organisation 2** literally took a narrative approach to ensure that the strategy reached the relevant individuals. The initial roadshows and presentations were a sense-giving and meaning-making exercise where top management communicated the intentions and reasons for change in **Organisation 2**. They then had sessions wherein they further communicated the strategy as follows:

The **first** part of the strategy translation process was a sense-giving exercise by the CEO to the organisation-at-large. This was followed by meetings between the divisional heads and the CEO where they held discussions regarding the corporate and business strategies. During this process they had to make sense of the strategy and identify what the change meant for their respective divisions (meaning making and sense making). Participants had to develop action plans and investigate how they could make it practical for their sub-ordinates. There was a definite need for clarity, and this was enabled by the feedback in these sessions. The next part of the process included the lower-level employees.

During these follow-up sessions, the divisional heads had to take all the information they learnt and made sense of during the previous meetings and break it down for the sub-ordinates, while ensuring that they aligned it to the roles and jobs of employees. The divisional heads were tasked with having to make sense of the strategy, give sense (thus creating meaning for sub-ordinates) and, of course, check whether or not the message was received (checking for 'sense reception'). This check or evaluation was done in a very thought-provoking way by **Organisation 2**.

Each division was allocated a fairy-tale such as "Robin Hood" or "Snow White". The divisions were then tasked with the duty of re-telling the story of the strategy as they understood it with the use of a specific story line. This method of strategy transfer proves that the narrative approach to strategy, cited by various authors (Meretoja, 2021; Brown & Thompson, 2013; Cunliffe & Coupland, 2012; Fenton & Langley, 2011; Riessman, 2008; 1993) is effective and can be applied practically.

In order to apply the narrative approach, employees in **Organisation 2** would firstly have to be familiar with the story line of the fairy-tale and, secondly, they would need to really understand the strategy to re-tell it in that manner. Teams were developed within divisions and each team then presented the story to their direct peers, then to the divisional heads and, finally, to the rest of **Organisation 2**. The reason for the multiple presentations was to ensure that there was a shared understanding developed among peers (personalisation of the strategy), followed by an understanding developed between management levels that any misconceptions or misunderstandings were first addressed at the divisional level.

The final presentations to the rest of **Organisation 2** were done to investigate whether the middle- and lower-level management understood the strategy-at-large (corporate-level strategy) and whether or not they were able to customise (unique/contextual application) it correctly on a divisional level (business-level strategy) as well as on an individual level (operational-level strategy). This reflects personalised meaning making by employees. This was done to check whether or not employees were able to rendition the strategy accurately. In line with feedback, the study proposes that a sense-checking exercise be performed on a regular basis to pursue that sense reception of the strategy has taken place. Management should do this to ensure that the feedback loop is part of strategy.

The 'story-telling tool' used in **Organisation 2** was widely appreciated and participants indicated that the method of delivery allowed them to retain information and recall it at a later stage with little difficulty. Through this tool, participants indicated that they could tell the story of **Organisation 2** and the strategy that drives it without having to consult. While not as blatant, there was evidence of the use of story-telling in **Organisation 1** and they, too, indicated that, for them to make a determination of the strategy message having landed, it was dependent on the ability of participants to not only action the strategy but to narrate the experience and the strategy to either the sub-ordinates, peers or a superior.

From these data the following proposition was developed:

P9: The test for strategy translation is accurate renditioning.

The additional step that was followed, once again, to investigate whether or not the strategy was translated effectively was to conduct a company-wide survey (see **Appendices O** and **P**), asking several questions regarding the strategy.

The results of the survey showed that there appeared to be understanding from all employees with regard to what the strategy entails. The question of whether or not supervisors had understood and implemented the key objectives, linked to sense giving. There were a few outliers who stated that 'sense giving' had not really taken place and thus confusion existed. Some employees indicated that they did not really see the link between their jobs and the strategic objectives, which is of key concern as it meant there may have been a gap in terms of action and the strategy. Gay and D'Aprix (2007:27) indicated that employees tend to relate to the strategy if they are able to link their work to the objectives in the firm. The survey results also indicated that there was some level of buy-in from the employees.

Based on some of the responses given before (sense given and alignment of the job to strategy) it appeared that a survey may not really be an effective enough measure to determine buy-in.

The way in which some of the questions were phrased, together with the lack of anonymity could have led to coercive "agreement". This links to the element of fear that sometimes drives or hinders strategy implementation (Beer & Eisenstat, 2000;

Steigenberger, 2015). The final method of translation that was driven by the initiative in **Organisation 2**, was to make the strategy more visual. Posters displaying and explaining the strategy were put up on almost every wall in the offices. The reason for this was so that employees would always see and remember the strategy and so they would remember always to make the link of the strategy to their daily work and act on it in a way that makes sense to them and works for the job at hand (modified enactment).

The findings thus show that the determination of buy-in to strategy, therefore, requires more than verbal confirmation. Buy-in to a strategy also requires action or enactment of the set strategy. Furthermore, one can generally determine whether or not the strategy was indeed received only by observing the modified enactment of the strategy by the sense receivers.

Verbal confirmation or narration may thus be inadequate to validate the reception of the strategy. The following proposition was developed in line with the findings:

P10: Enactment can be used as a measure/indicator of sense reception

6.5 FINDINGS IN LINE WITH SENSE RECEPTION

“The greatest enemy of knowledge is not ignorance, it is the illusion of knowledge”

Daniel Boorstin (1914 - 2004)

6.5.1 Perceived reception can be a deterrent to strategy translation

It is important to note that perceived reception can be equally or even more damaging than non-reception of a strategy. It appears once again key to impress upon management the importance of really knowing and checking that reception has taken place before attempting to implement a strategy. Making assumptions regarding the reception of a strategy could lead to mis-direction of resources, ineffective use of time and may mean staff- or financial-losses for organisations. These assumptions must be addressed by both the sense givers (top- and middle-management) as well as the receivers. While the research revealed that mistakes may be beneficial to learning,

there is a limit (especially when it deals with issues that could spell financial demise for the organisation-at-large and are addressable).

6.5.2 Examining the existence of the sense reception elements in the translation of strategy

The presence or existence of the reception elements was investigated during interviews. Some of the elements were not explicitly stated but implied in responses. The researcher was able to draw inferences from the statements made. Where none existed, the researcher asked whether the participants identified with any of the elements. As indicated, while not all were found with each participant, there was a sufficient number to validate their existence. In **Chapter 3**, the following was found to exist in relation to the conceptual elements.

6.5.3 Personalised meaning making

It was confirmed that all managers do indeed have to create meaning of the strategy before they can attempt to give input, instruction, question or action the strategy. At top-management level, meaning made of strategies is often “theoretical” and plan based. In contrast, at lower or operational level, most employees were highly action based and needed to understand how to apply all the content transferred ‘practically’. Middle-management level represents a bridge of some sort between top- and lower-level management in terms of understanding of both the planning and implementation phases.

They are tasked with the duty of having to draw meaning from what top management indicates as strategies and how to action those strategies in a way that makes sense to the implementers and in a way that will align with top-management’s plans (Hope, 2010). Based on this, each individual involved in the strategy, has to make meaning of the strategy and further break that meaning down in a way that speaks to their own personal frameworks and responsibilities. They need to understand what the strategy means for them and their duties and what non-implementation could mean for them and the organisation. One can thus create meaning for someone and give sense but for that message to make accurate and personal sense to the receiver, the receiver, too, has to create personal meaning of the strategy message to attempt to begin the implementation process (Lowe, Rod & Hwang, 2016).

6.5.4 Context-specific application (personal job environment)

Once personalised meaning making of the strategy has taken place it then becomes relevant to relate that meaning made to the context wherein the individual operates. The question of what the word 'strategy' meant to participants was indicative of their knowledge around the topic of strategy and, to an extent, gave away how the concept was communicated to them. It was clear that most participants, particularly those at top- and middle-management level (Rouleau & Balogun, 2010), were able to identify how the strategy influenced them and how they could link it to their job to meet the objectives of the organisation.

At a junior level, managers showed an understanding of what the organisation stood for (mission) and what that meant in practice. Where the strategy was very well communicated, it appeared that top management had been able not only to communicate the strategy, but they did so in a manner that allowed employees to link it to their jobs and the way in which they did their jobs (Boswell *et al.*, 2006). They also need to know the inverse, meaning how does the way they do their jobs influence the strategy, and organisation, by extension. The link needs to be created so that people understand the intricacies and that an organisation in an ecosystem and each organism has a role to play no matter how small. It is not enough to know the strategy of the organisation or even that of a specific division off by heart but not know what it means for you and how that strategy must be applied contextually.

6.5.5 Buy-in matters but is not action reliant

People are able to action out a strategy without really buying-in to it. A strategy can, therefore, still be implemented effectively without buy-in. What may happen is that an individual can hear the strategy, create personal meaning and adapt it to their own job without really believing in the strategy. One may then ask, "Does buy-in matter?" "Yes, buy-in does matter" as it encourages action and learning without the need for coercion and could eliminate the possibility of people acting outside of their scope of work or abilities (Thomson *et al.*, 1999). Buy-in of top- and middle-management means they will be able to distribute and translate a strategy in which they believe. They may be more willing to teach and be more receptive of the strategy.

As indicated, some participants asserted that they had in the past acted against direct orders if they felt that the strategy was better done in a specific way. Regardless of the reasons, this is not ideal as it means employees either do not believe in a strategy

and so they choose not to implement it or they may implement their own strategies that are not necessarily aligned with those of the organisation. This could be addressed by the feedback loop and, more especially, by the inclusion of various management levels in the different stages on the strategic-management process (within bounds). It can be addressed further by management developing an awareness of employee expectations, abilities and willingness to allow their inputs.

Findings showed that buy-in or reliance can also be leadership determined (French-Bravo & Crow, 2015). This means that situations can exist wherein people believe in the leader but not necessarily in the strategy. They trust the leader's judgement and may be biased towards the leader without understanding or believing in the strategy (Kumar, 2015). The ideal is to have a balance because a strategy may be better off not linked to a leader but rather to the organisation, its people and its culture. The link between the leader and the strategy may pose problems at a later stage. Followers may divorce the strategy if the leader were to do the same or if they exit the organisation. It is thus critical that leaders should determine the source of buy-in during feedback sessions.

6.5.6 Modified enactment

Meaning is created for the sense receivers or implementers; they develop personal meaning of the handed-down strategy and begin to apply it mentally to their respective contexts or jobs. Thereafter, the implementation or actioning of the strategy must take place. What is important to note here is that by the time an organisation's staff arrive at the implementation stage, several types of 'modifications' have taken place. The receiver (generally the implementer) modifies meaning, modifies their stance of whether or not to buy-in to the strategy and modifies the strategy (to an extent) to fit into their individual context. The final modification must thus happen at the action level of the strategy (Kezar, 2012).

Sense making involves enactment as one of its key criteria and, as such, once sense has been made of the strategy, enactment can take place. The difference with reception is that enactment must be modified or changed to implement the strategy translated. Participants indicated that, once they had gone through the strategic-management training or coaching, their approach to strategy implementation changed and so did the way in which they did things. They highlighted that they developed a new awareness of certain things, activities, individuals and practices.

To ensure that they did indeed learn about the strategy of the organisation, they changed some behaviours and actions to ensure that they were more aligned with the corporate vision and mission.

This was done in both **Organisation 1** and **Organisation 2** as one organisation had 'innovation' as one of their key focus areas – which meant they constantly changed things. The other organisation had just come out of a strategy development initiative. This was important as there was monitoring of all participant activities and feedback sessions involved checking whether or not the strategy had in fact 'landed' (Pretorius, 2016). This enactment further allowed the formulators and implementers to “test” whether or not the strategy had been received. In the event that it was perceived to not have been received, feedback informed this and allowed for corrective action to be taken. The conceptualisation of strategy alone is, therefore, not enough (Gioia & Chittipeddi, 1991) and it is vital to act upon the translated strategy in an effort to see whether or not it was well received.

6.5.7 Accurate renditioning

Story-telling was highlighted as a critical translation tool and so the need to narrate strategy is evident. The narrative must, however, come from all parties. Traditionally, the narrative comes from top management and filters down. To determine whether or not the translation of the strategy has taken place, the strategy must be renditioned. Sense givers indicated that their 'test' to see if the strategy was translated in the manner intended was to ask sense receivers to actually re-tell the strategy. This was not necessarily in an instructional 'show-and-tell' manner but rather during feedback sessions and at times during the implementation process.

What this study has clarified is that to determine translation, the renditioning or narration of strategy must happen from both the top-down as well as the bottom-up. It is especially important that it happens from the bottom-up for the sense givers to determine the accuracy and to check for any gaps in how the receivers perceive the strategy (Barta & Barwise, 2017). Renditioning also offers a way to “sense check” and it is through the renditioning process that feedback takes place. The story of the strategy and how it makes sense to the receiver is told and the sense giver acts as an audience (Meretoja, 2021). While the story does not have to be told in a duplicate fashion (given context and personalised meaning making), the strategy message has to be the same.

Renditioning offers the narrator an opportunity to give sense to another individual and to essentially tell the story as they understand it and as it relates to them. If the narrator is unable to tell the story of the strategy, it may be indicative of a lack of understanding or an inability to articulate their understanding.

Thus, narration can enable corrective action prior to implementation (Brown & Thompson, 2013; Fenton & Langley, 2011). At the point of renditioning, the narrator (who can be a 'sense maker', a 'sense giver' or a 'sense receiver') will have ideally gone through the entire sense-reception process and it is at this point that one can check whether or not the strategy was translated accurately.

The test for renditioning was applied practically in this study. The 'interview to the double' (ITTD) was utilised to further investigate the translation process. With the normal interview style, participants were asked questions that investigated translation. There was no literal narrative in the traditional interviews but the ITTD almost forced participants to narrate the strategic-management process to their 'double'. They essentially entered a process of translation and told the story of the strategy to their 'double'. The protocol questions utilised a more direct line of questioning which may sometimes make people feel like they are 'on the spot' and they may feel under pressure to answer in a specific manner. The ITTD shifts the power balance as it allows the participant to give directives to the 'double' and it enables an opportunity for the participant to express fully how things should be in an ideal situation (Guest, Bunce & Johnson, 2006). In doing this, the researcher was able to derive the method by which the participants made, gave sense and how they expected it to be received by their 'double'. They enter a story-telling mode which ultimately meant they had to rendition the strategy to their 'double'.

The accuracy of the strategy renditioned was largely dependent on the other person's responses (the reception of the renditioned strategy). If they were the same, one could make a determination of that strategy or the process followed to deliver strategy. The inability to rendition accurately may indicate that participants do not know the strategy well enough and they require re-iteration from the sense givers to understand the strategy fully. Situations can exist where someone chooses not to rendition the strategy either because their supervisor assumes, they have a firm grasp on it or from fear of being incorrect or contradicted. While non-causal, there exists a chance of incorrect or non-implementation of strategy due to the lack of feedback.

6.5.8 Framework validation

During interviews the questions addressed the processes followed by management when handing down strategy, receiving strategy and giving feedback during various phases of the strategic-management process. The study also investigated how people create meaning of their environment (internal and external), develop strategies and create meaning for others.

The findings indicate that the sensing process put forward by the framework applies to strategy practically. It is, however, not always a systematic process and certain activities can happen before others or even happen concurrently.

6.6 CHAPTER SUMMARY

Chapter 6 discussed the main finding from the data collected from the various sources. It conceptualised the themes identified, discussed the sense reception elements from the findings and investigated the validity of the proposed framework. The next chapter concludes the research; discusses the limitations of the study and contains recommendations for future research.

CHAPTER 7:

CONCLUSIONS, CONTRIBUTIONS, LIMITATIONS, RECOMMENDATIONS, AND REFLECTIONS

7.1 INTRODUCTION

This chapter aims to provide a brief summary of the contents of the document, followed by the main conclusions drawn from the study, its contributions, limitations, recommendations and, finally, a brief description of the most significant extracts from the researcher's self-reflections, recorded throughout the research process. The findings discussed in the previous chapter make a significant contribution to knowledge about the complexity of the relationship between the concepts of sense and strategy translation.

This study explored sense reception and its significance and occurrence in strategy. The study sought to investigate the movement of the strategy message beyond its mere communication to individuals within an organisation. The way in which the strategy translates along organisational hierarchy was critical to understand as were the processes followed in translating strategy.

Chapter 1 and **Chapter 2** of this study focused on specific aspects of sense and strategy in organisations. They discussed the differences between sense making, sense giving, sense taking, sense breaking and meaning making in relation to strategy. The chapters included a review of literature.

A contribution was made in this chapter by introducing the empirically developed translation framework known as the 'hierarchical sensing loop'. The framework shows the flow of strategy information in organisations to include the various senses during the strategic-management process. The framework can be used by managers in practice to guide the translation of strategy in various contexts and to drive certain behavioural practices in organisations.

Chapter 3 introduced the concept of sense reception as part of the chapter's unique contribution to building theory, discussed the five core elements of sense reception in detail and created the link to reception and translation.

Chapter 4 discussed the methodology employed in the research and indicated how primary and secondary data were collected, analysed and used to inform the study.

Chapter 5 presented the findings from the various data sources. These included face-to-face, in-depth interviews in both case organisations; presentations given to top management in **Organisation 1** and a survey collated to determine whether or not the strategy was well-established in **Organisation 2** following a strategy translation initiative in the organisation.

Chapter 6 discussed the main findings from both case organisations. The sense-reception elements were investigated against the findings in the research and the accuracy of the framework observed based on the data collected.

Chapter 7 concludes, discusses the limitations, recommendations and key contributions made by the study, while answering the suggested research questions.

7.2 KEY FINDINGS OF THE STUDY

The various concepts related to sense making and meaning making are explicated and the link to strategy translated solidified. While the key is not to focus on communication of the strategy, it is impossible to translate without communication. Thus, in understanding the translation of strategy, we investigated the “how” of communication in the initial stages of the research. The study went a step further to address the reception of sense by managers on all levels of the organisational hierarchy. In order to achieve this, a new sense concept, namely, ‘sense reception’ is proposed. This concept focuses on understanding how individuals receive the translated strategy and how they are able to generate personal meaning of the strategy prior to attempting its implementation.

The findings indicated that strategy remains elusive to many. A great number of people on various management levels may misunderstand and misinterpret strategy. It was established that the issue of ‘ignorance’ is one that can be addressed provided that feedback is done in a timely and constructive manner. Process and structure were found to be both good and bad for strategy translation. This is because some behaviours are embedded in the culture of the organisation and are often difficult to change. This is especially true for experienced individuals as they have a specific mindset.

What was found to be fundamental when creating meaning for others was that sense making and meaning literally needed to be 'broken down'. People's pre-conceived ideas often need to be done away with so that individuals can start to build and create a new meaning of strategy. This can prove difficult especially from a sense-making perspective. Given that sense making is personal, some individuals may take the process of change as a challenge to their abilities.

Awareness plays a critical role in translating strategy. Once a manager is aware of his or her sub-ordinates' cognitive abilities and limitations, he / she is able to customise the message in a way that speaks to the individual. This customisation appears to be heavily sought after in organisations with many employees indicating the need to understand their role and how they fit into the strategy of the organisation. Beyond the need to understand the actual strategy was the desire of many to know why they were expected to act out certain things.

The study showed that various management levels understand and interpret strategy differently. This was expected and appreciated by participants. The conceptual differences do not mean they understand strategies differently but rather that they have a different understanding of the same strategy. In translating strategy, sense givers should not assume that everyone will understand strategy the same way.

Fear was found to be one of the leading barriers to strategy translation. This fear discouraged some from asking questions as they assumed it would show their lack of knowledge about certain matters. This was found to be addressed easily if sense givers demonstrated understanding and awareness.

Stress and frustration were found to inhibit sense reception and, thus, the translation of strategy. It is therefore key that sense givers create meaning through various methods which take cognition into consideration and thus reduce ambiguity (Weick, 1995; Bawden & Robinson, 2008).

The study proposes a framework which may serve as a guideline for strategy translation. If management is able to follow the processes given within the framework, it may be able to improve the reception of strategy, identify limitations of strategy translation and address them (provided they are not fatal) and, ultimately, drive the translation of strategy in organisations.

The study findings confirmed the literature researched that sense making is not a solitary activity and that the sense making of others is often informed by situations, and other individuals. Through this study I was able to note, as indicated by Weick (2005), that each individual is indeed a “a parliament of selves”. Findings indicate that it is critical for an organisation to have a shared understanding of the strategy so as to implement the strategy correctly. Context is key when attempting to translate strategy and there is no one “right” way to translate a strategy. Many aspects are involved but understanding the sense processes enable one to create context for oneself and others.

A key finding was that a narrative approach to strategy translation may be highly effective as it allows individuals to relate to and relay the strategy in a way that makes sense for them. Using story-telling as a tool was found to be effective in allowing people to remember the strategy and make personal connections to the strategy.

While it does not infer causality, by employing a sense lens to strategy implementation failure, the study shifts the focus away from the traditional “reasons” for implementation failure.

7.3 CONTRIBUTIONS OF THE STUDY

The study makes a number of novel contributions to the theory on the understanding, absorption and retention of strategy in organisations. Furthermore, it contributes to practical managerial practices by introducing the core-reception elements required for effective translation and offers a framework for strategy translation.

The researcher explored how the case organisations (**Organisation 1** and **Organisation 2**) make sense of their development, understanding and transfer of strategies. The researcher employed a multi-level assessment of the strategic-management processes followed and questioned how the various levels of management use information to make sense, give sense or create meaning for others and, ultimately, how they receive sense to implement the developed strategies.

This study offers managers detailed comprehension into the concept of sense reception and how the various elements can allow for better translation of strategy. The intricacy of the various senses is reflected in the study and no single type of sense is more important than another.

The study highlighted that organisational value can be created by having an inclusive and transparent culture. The study reflected the importance of balancing organisational culture and leadership. This is based on the fact that people tend to follow a leader as opposed to the strategy which may cause issues if leadership changes.

The researcher went through a sense-making process by trying to understand how managers make sense and how they create meaning for others. The study offers a unique contribution by developing the sense-reception concept in strategy and organisation behaviour.

7.4 LIMITATIONS OF THE STUDY

The first limitation was sample size. It would have been useful to test this research on more organisations. While the findings emerged from two case organisations, generalisability is not assumed. Given the differences in the case organisations (industry, size, management style) the findings are potentially transferable and may be echoed by strategy professionals in other fields and contexts. The nature of the study did not allow for single interviews as it required a multi-level approach to answer the research questions.

The next limitation was that of time. Given more time and acceptance from the organisations, the research would have gathered richer data from multiple observations and investigations of strategy in practice.

7.5 RECOMMENDATIONS FOR FUTURE RESEARCH

Future research could seek to ascertain whether or not the findings in this study are applicable to other contexts. The developed framework could also be used to test its applicability in terms of the possible ways in which the five elements can be applied. The study proposes several actions in line with the reception elements.

The proposed actions are:

1. **Buy-in** requires inclusivity of people at various levels as it allows them not only to understand the strategy but to give input before they decide whether or not to buy-in to the strategy. There is a need to develop a conviction for implementation among employees.

2. **Personalised meaning making** requires an initial customisation of the strategy message by the sense giver. Thereafter the sense receiver, upon understanding the strategy and their role in the strategy implementation, has to clarify through consultation what the strategy means for them in their individual capacity.

3. **Context-specific application** requires the sense receiver to understand how the strategy plays a role in their direct and work environment (job) and formulate action plans to allow for the execution of the strategy. Creating visibility of the strategy may also aid in enabling employees to link the strategy to their jobs.

4. **Modified enactment** is achieved when the actions of an individual alter to fit into the strategy, having taken context into consideration. The receiver has to work with others to implement and apply the new actions or behaviour to the work environment while bearing in mind the objectives set out. Through this managers will be able to monitor how the strategic plans are being put into practice and take corrective action if need be.

5. **Accurate renditioning** of the strategy acts as a control mechanism among the management levels. It requires the sense receiver to tell the story of the strategy. This can be done in a variety of ways. These involve events such as strategy retreats, one-to-one coaching sessions, mentoring, management by walking around and other direct “presenter” instances. This means the strategy must be “re-told” to other people with a feedback session in place to ensure that the strategy has indeed been renditioned accurately. A final action related to renditioning is for organisations to develop a culture that celebrates and keeps alive the strategy narrative.

These actions, while recommended, are not prescriptive and can be adjusted to fit and suit the organisational context. The main aim of the proposed actions is to highlight the practical ability that links to the proposed sense reception concepts.

Future research could also do a more in-depth analysis of sense receivers and their perspectives on strategy. It could also discuss the sense-reception elements in a variety of other contexts (such as those of teaching and learning).

7.6 RESEARCH QUESTIONS ADDRESSED

The study sought to answer four research questions. Based on the findings, the research questions were addressed and answered. Below are the research questions and answers:

1. Is 'sense reception' a plausible concept?

The findings indicate that sense reception is a plausible and necessary concept that could inform the success or failure of strategy translation.

2. What is the relationship between 'sense reception' and 'strategy translation'?

Sense reception moderates feedback which can thus enhance strategy translation. Without sense reception the translation of strategy may not happen, or it may be ineffective. Sense reception can also improve strategy translation in organisations by creating an awareness of any potential gaps in the strategy and its translation prior to implementation.

3. What informs the existence of 'sense reception' during 'strategy translation'?

The presence or absence of the five reception elements informs strategy translation.

4. How can the proposed 'sense framework' address 'effective translation' across the management hierarchy?

By ensuring that all the senses are considered when attempting to translate strategy and that feedback takes place in a constant and consistent manner, so the strategy message may be passed on effectively and strategy be translated as intended.

Furthermore, the research was able to achieve the following objectives:

- It conceptualised the role of 'sense' in strategy and proposed a 'new sensing concept' known as 'sense reception'.

- It gained insight into the practices and processes that are used and applied by the managers when embarking on 'strategy translation' across the management hierarchies.
- In conceptualising 'sense reception', it identified that the elements are present in practice.
- It developed an enhanced 'strategy translation framework'.

7.7 RESEARCHER'S OBSERVATIONS

In attempting to acquire a better understanding of the phenomenon investigated, the researcher went through an exercise of sense making. Firstly, by reading and analysing secondary data and, secondly, by observing specific things during the primary data collection. The researcher made the following observations:

Strategy is considered important but remains ambiguous to some. This may lead to people making their own assumptions about what strategy entails and how they fit into the organisation. The role of the employee matters to them and people often ask why they should do something and, secondly, how that involvement will benefit them or their employer.

When asked something they did not understand most participants seemed comfortable enough to indicate this. This was also evident with participants who indicated their lack of strategy knowledge.

At first some participants seemed slightly reluctant to enter into a conversation relating to strategy, but opened up as the interview commenced and they realised that the study aimed to understand their perspectives and experiences.

While present, it is difficult to measure the sense-reception elements and so what happens is that through feedback there can be a 'check' of some sort to test and check whether or not it has taken place. A good tool to test this is one which was suggested by some managers: that of 'management by walking around'. It is perceived to allow for personal or one-to-one interaction and for immediate feedback. The time for feedback was also seen as critical as both organisations were fast paced. Timely feedback allows not only for a quick reaction time but it does away with incorrect assumptions and non-compliance by some employees.

It appeared that some employees prefer information to be as concise as possible to make sense of it, reach a decision or act upon it. Some of the more junior employees appeared to feel that wordy information could lead to data or information overload which acts as a distractor to the translation of strategy. In creating meaning and giving

sense, the sense givers essentially filter out any information that they deem non-essential for the delivery and reception of the strategy message.

The narrative of 'strategy' was often told from an organisation's perspective rather than from a personal viewpoint. This point indicated the need for management to begin to encourage personalisation of a strategy.

While they appeared to understand it, many participants (especially from **Organisation 1**) did not really seem to "own" the strategy.

'Strategy' is multi-faceted and, as such, its translation can take place in different ways, using different channels and communication styles. This is why: Understanding the reception of employees is important as it allows sense givers and sense receivers to 'customise' the strategy for their own understanding and that of others.

Top- and middle-management answered questions in a very narrative way which indicated their level of experience but also forced the researcher to consider strategy differently. They were able to weave strategy into stories of past projects and experiences. They created a lot of context, something which was not really evident with junior participants (Brown & Thompson, 2013).

Technology was not seen as an aid to strategy translation. While it made the flow of communication easier, many participants still relied on basic visuals (posters) and face-to-face interaction to translate strategy and give feedback.

While multi-level inclusivity was appreciated and recommended, the role of the leader and top management in strategy translation was constantly and consistently mentioned as vital for effective strategy translation.

Openness and transparency between management levels came through as a key success factor for strategy translation as it appeared to create a platform for strategic conversation to take place.

7.8 SUMMARY OF FINDINGS

The key findings from this research are:

- Sense-reception elements should be present to confirm translation has taken place.
- When translating strategy, it is key to talk **to** people and not **at** them (distinction made by engagement).
- The sense-reception elements are key to landing the strategy message.

- Without the feedback loop, translation of strategy becomes an exercise of sense giving which relies on instructions and assumptions (sense taking versus sense reception).
- The feedback loop is an essential tool for engagement, sense checking, teaching and general translation of a strategy.
- Reciprocal story-telling is key to translating strategy.
- Mentoring and coaching have been suggested as corrective / monitoring tools.

In conclusion, investigating 'sense reception' in strategy translation proved to be a challenging, yet relevant, topic. The belief is that the research may help managers and other practitioners to translate strategy more effectively within their respective organisations. It may help to ensure that strategies developed are relevant and that gaps in understanding or disagreements in processes, are addressed prior to implementation. Finally, the findings from this research may assist managers to make the better decisions and allow implementers to action strategies they understand and in which they believe.

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**APPENDIX A:
RESEARCH ETHICS COMMITTEE APPROVAL**

16 October 2018

Prof M Pretorius
Department of Business Management

Dear Professor Pretorius

I refer to this committee's letter dated 20 August 2018. The documents and clarifications resubmitted in response were reviewed on 12 October 2018, and the committee's decision is reflected below:

Protocol No:	EMS118/18
Principal researcher:	RG Letsholo
Research title:	Unpacking the dynamics of sense making, sense giving and sense reception in strategy translation
Student/Staff No:	27040098
Degree:	PhD (Business Management)
Supervisor/Promoter:	Prof M Pretorius
Department:	Business Management

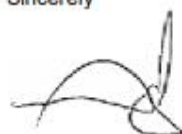
Outcome of resubmission:

Decision:	Approved
Conditions (if applicable):	None
Period of approval:	October 2018 – September 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, student or lecturer 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 B:
INTERVIEW PROTOCOLS**

B.1 INTRODUCTION

Good day Sir/Ma'am,

Thank you for agreeing to participate in this study. Your inputs are greatly appreciated and valued. The study aims to probe your experiences and perceptions on strategy translation within the organisation and to investigate how various senses play a role in the translation of strategy.

B.2 MAIN QUESTIONS

Questions posed to top- and middle-level management

1. What is your job title?
2. How much experience do you have in strategy?
3. Experience in this particular position?
4. Indication of how the strategy management teams are set out (to highlight the management levels)
5. When you hear the word '*strategy*' what comes to mind?
6. You may often hear specific words or jargon used in the strategy landscape. One of those involves '*external analysis*.' Do you relate?
 - a. If so, how would an external analysis come into play when you develop a strategy? [Tests SM.]
7. Are there key things you look for when using external information?
 - a. To aid or guide your strategy?
 - b. What are they?
 - c. If not, why do an external analysis?
8. What is your role in the strategic management process?
9. What is your level of involvement?

10. If you have a strategy session planned on a specific day.
Can you take me through the typical process you would follow:
 - a. which people you would consult with when setting out the strategy?
[Hopefully, SM, SG and SR come through.]
11. So, the strategy is now formulated, let us think about how you used external analysis to make sense of what was happening outside the organisation and how that information was used to guide your thinking.
12. What are the channels you use to communicate the strategy '*downwards*'? Would you take me on a virtual tour of how you would '*hand down*' the strategy to your sub-ordinate [next management level] who perhaps also needs to hand it down further or is maybe the final implementer?
13. What are the key things you take into consideration when you '*hand down*' the strategy?
14. What is the formal process used for this '*hand down*'?
15. Is there some sort of feedback rule, process or procedure that sub-ordinates need to adhere to? Would you kindly elaborate further?
16. May I give a scenario?
You have just finalised the strategic management plan for your marketing management division (for argument's sake) and you arrive at the office on Monday and are told that your current middle-level manager / lower-level manager has just resigned and you have just been allocated a new middle- / lower-level manager who is 'fresh out of university' (without delegating). Please take me through the process of how you would translate:
 - a. The strategy to him / her and explain it to him / her?
 - b. His / her role in the organisation firstly and, secondly, in the strategy?
17. What key things you would have him / her look out for?
18. Anything he / she should do when conceptualising the strategy?
19. What feedback will inform you that he / she has received the strategy?
20. How he / she needs to delegate this further to a lower-level employee [if middle-management level].
[Tests multi-level inclusivity.]
21. What is the level of awareness of staff on the strategic plans and efforts to meet certain objectives?
22. How comprehensive is the strategic management plan of your division / functional area(s) [perhaps in line with the organisational plan or strategy]?

23. Do you have any idea what the perceptions of lower-level employees are when it comes to the strategy of the organisation-at-large or the strategy of the division?
24. Do you think the perceptions of employees vary according to the levels and divisional areas? If so why? And, if not, do you think there should be a variation? (Why not if you advocate for no variation?)
25. How do you address the variation?
26. How aligned are organisational practices and processes (specifically in strategic management) to the job descriptions and specifications of lower-level managers?
27. The current strategic management decision process you have... does it allow for multi-level involvement? At what level? If not, why not? And, if so, in what way?

Tables B1 and B2 indicate which concepts were being tested in each question.

Table B1: The interview questions linked to the concepts under investigation (Protocol 1)

Categories	Question
Sense making	6, 7, 10, 11
Sense giving	8, 10, 11, 12, 13, 14, 15, 16, 21
Sense breaking	8, 10, 12, 13, 16
Strategy translation	5, 8, 10, 12, 13, 14, 15, 16, 18, 22
Experience, Cognitive limitations/benefits	1, 2, 3, 5, 10, 17, 19, 20, 22
Process, practices	5, 6, 7, 8, 9, 16, 18, 21, 22
Communication	8, 9, 10, 11, 12, 18, 22
Sense reception	10, 16, 19, 21, 22
Feedback	4, 5, 10, 12, 14, 16, 18, 20, 21, 22

Questions posed to middle- and lower-level management

1. What is your job title?
2. How much experience do you have in strategy?
3. Experience in this particular position?
4. Indication of how the strategy management teams are set out (to highlight the management levels)
5. When you hear the word '*strategy*' what comes to mind?
6. You may often hear specific words or jargon used in the strategy landscape. One of those involves "*external analysis*." Do you relate?
 - a. If so, how would an external analysis come into play when you develop a strategy? [Tests SM]
7. Are there key things you look for when using external information?
 - a. To aid or guide your strategy?
 - b. What are they?
 - c. If not, why do an external analysis?
8. What is your role in the strategic management process?
9. Do you know what the overarching strategy of the organisation is?
 - a. Can you tell me what it is?
 - b. Do you know clearly what your role is in achieving this strategy?
 - c. Taking into consideration your position, what role do you feel you play in achieving the "corporate strategy"?

The next questions will focus on a combination of corporate and functional level strategies (or divisions).

10. What is your level of involvement when it comes to the formulation of the strategy?
 - a. Can you give me a breakdown of how the process starts and continues as well as your role at each stage in the process?
 - b. If you are not involved in the formulation, do you know why not?
 - c. Do you think there would be value in your involvement?

11. If you have a strategy session planned on a specific day.
Can you take me through the typical process you would follow,
 - a. which people you would consult with and to whom do you report when setting out the strategy?

[Hopefully, SM, SG and SR come through.]
12. During the formulation process how is information communicated to you with regard to:
 - a. Giving you an understanding of what is expected of you?
 - b. How your role comes into play when moving towards implementation?
 - c. Would you say you are the final implementer of the strategy?
13. What are the key things that you expect to be communicated to you when a strategy is "*handed down*"?
14. Do you have a formal process for handing down strategy?
 - a. Would you please walk me through this process?
15. In the event of a lack of clarity, is there some sort of feedback rule, process or procedure that top management expects you to adhere to?
 - a. Would you kindly elaborate further?

Top management just finalised the strategy.

16. Let me give you a scenario:
You have just finalised the strategic management plan for your marketing management division [will change according to the subject profile] and you arrive at the office on Monday and are told that your current middle manager [namely, the one you report to] has just resigned and you have just been allocated a new supervisor who is 'fresh out of university' [without delegating].
Please take me through the process of how you would explain:
 - a. Firstly, the overarching strategy to him/her and what it means for his / her job.
 - b. His / her role in the organisation firstly and, secondly, in the strategy management process.

While this person is your supervisor, they are inexperienced and you need to guide them so they can guide others. So, when the next strategy session comes up:

17. What key things would you have him / her look out for?
18. Anything he / she should do when conceptualising the strategy?
19. How can he / she give you feedback if he / she is confused?

- 20.** What is the level of awareness of staff in general on the strategic plans and efforts to meet certain objectives?
- 21.** Do you have any idea what the perceptions are of the non-managerial employees when it comes to the strategy of the organisation at large or the strategy of the division?
- 22.** Do you think the perceptions of employees vary according to the levels and divisional areas? If so, why? And, if not, do you think there should be a variation.
[Please state why not if you advocate for no variation?]
- 23.** How do you address the variation?
- 24.** How aligned are organisational practices and processes (specifically in strategic management) with the job descriptions and specifications of lower-level managers?
- 25.** The current strategic management decision process you have... does it allow for multi-level involvement? At what level? If not, why not? And, if so, in what way?
- 26.** If you had to explain to the cleaner in your division their role in attaining the strategic objectives of the firm, how would you go about doing it?
- 27.** When implementing a strategy, how do you know that you are actioning that which was planned?
 - a.** Would you ever go against direct orders during implementation if you felt that it would add value?
 - b.** Do you know why previous or some strategies never 'made it' to the implementation phase in the organisation?
 - c.** What would you say are the key things that lead to failure of implementation of a strategy?

Table B2: The interview questions linked to the concepts under investigation (Protocol 2)

Categories	Question
Sense making	6, 7, 9, 10, 11, 13, 16, 17, 18, 20, 21
Sense giving	9, 11, 13, 16, 20, 26, 27, 21
Sense breaking	6, 9, 10, 13, 16, 17, 18, 20, 26
Strategy translation	9, 10, 11, 12, 13, 16, 20, 21, 26, 27
Experience/Cognitive limitations/benefits	1, 2, 3, 5, 6, 8, 9, 10, 16, 17, 20, 21, 22, 26, 27
Process, practices	7, 8, 9, 10, 12, 12, 16, 17, 18, 20
Communication	7, 9, 10, 12, 12, 16, 19, 26
Sense reception	10, 11, 12, 13, 16, 20, 21, 22, 27
Feedback	4, 5, 10, 12, 13, 14, 15, 16, 19, 20, 27

Case study investigative questions

The case study investigative question focused on:

1. Feedback presence.
2. Multi-level inclusivity during strategy translation.
3. Consideration and provision for cognition.
4. Consideration of how the different senses play a role in the translation of a strategy.
5. Presence of reception elements.
6. Improved strategy translation resulting from integration between the senses.
7. Better comprehension of the translated strategy due to consideration of sense reception.

B.3 CONCLUSION

We have reached the end of our interview.

Thank you for your participation.

Do you have any questions?

**APPENDIX C:
INFORMED CONSENT FORM**



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Faculty of Economic and Management Sciences
Department of Business Management
Tel 012 420 4195

Consent for participation in an academic research study:
'Investigating sense reception in strategy translation'

Research conducted by:

Ms. R. Letsholo (Student nr:27040098)
Cell: 073 7875344

Dear Participant

You are invited to participate in an academic research study conducted by Rebaona Letsholo, a doctoral student, busy with a PhD in Business Management from the Department Business Management, at the University of Pretoria under the supervision of Prof Marius Pretorius.

The purpose of the study is to develop a theoretical construct on the sense reception of strategists in South African organisations. The study further aims to build on the understanding of strategy implementation by developing an enhanced strategy translation framework.

Please note the following:

- You are invited to participate in a semi-structured interview of approximately 1 hour. The interview will be recorded and the researcher will also make field notes.
- If you choose to participate, your identity will remain anonymous as will that of the organisation you are employed in. The benefits of participating in the study will also be discussed with you before the interview.
- 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.
- The nature of the interview will be semi-structured and should please be viewed as a conversation between yourself and the researcher on strategy translation within your organisation with references to some sense concepts which will be explained to you during the course of the interview.
- The results of the study will be used for academic purposes only and may be published in an academic journal or presented at a conference. We will provide you with a summary of our findings on request.
- Please contact my promoter, Prof Marius Pretorius (email: marius.pretorius@up.ac.za) or myself (email: reba.letsholo@up.ac.za) if you have any questions or comments regarding the study.

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 D:
JOURNAL CODES**

Journal Codes developed from interviews

Main concepts

Sense making
 Sense giving
 Sense reception
 Sense breaking
 Sense taking
 Strategy translation

Key Concepts

Codes (Meaning derived)

Communication

Linked (to strategy)
 As a tool to transfer / Translate
 Assumption (that it has taken place)
 Appropriation (Communication vs translation)*
 Blame (The strategy was not communicated
 = lack of implementation)
 Allocation to translation*

Barriers/Distractors

Resistance (to change, leadership, innovation)
 Technology
 Leadership style
 Jargon

Enablers

Freedom (of ideas, speech, learn)
 Technology
 Innovation
 Culture (Innovative, Open structure, hierarchical,
 layered, learner-driven (allows for faults)
 Leadership style

Considerations prior to translation

Level of management

Strategies (methods used) to translate strategy

Understanding of the strategy or understanding
 strategy (itself)
 Impact
 Ability to use and apply knowledge
 Story-telling
 Assumption of knowledge
 Heuristics

	<p>None</p> <p>Driven by policy - non-personal</p> <p>Experience Driven [The more you know the less I need to say versus having to convince because of the novelty]</p> <p>Recipient driven [Customised for the one receiving it]</p> <p>Consultative [Top-down versus Bottom-up versus Feedback loop]</p> <p>Line of sight? (If it affects you directly, you will be involved)</p> <p>Non-exclusive inclusivity (It may affect you, so you are included. You can learn from it)</p>
Reception vs Taking	
<i>Reception</i>	<p>Teaches (mentor, coach, hand holding, leading)</p> <p>Builds</p> <p>Enables</p> <p>Constructive</p> <p>Learning</p> <p>Empowers</p>
<i>Taking</i>	<p>Exposes</p> <p>Tells</p> <p>Enforces</p> <p>Breaks</p> <p>Necessary evil</p>
Attitude	<p>Resistance prevents learning</p> <p>Autocratic leader prevents teaching</p>
Structure	<p>Flat - offers better translation allowance</p>
Culture	<p>Enabling</p> <p>Embracing</p> <p>Change resistance prevents translation</p>

**APPENDIX E:
JOURNAL SAMPLE**

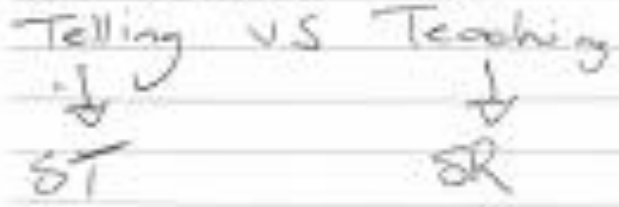
Accountability

Level of effort put in
in group work needs to
be the same effort you
would for an individual.

① Responsibility leads to
Response Ability - you are
effectively able to
respond to trends, ~~problems~~
problems, changes...

NB member checking NB to
ensure correctness
(Learning)

Teaching → Translate → DO
→ when "SG"



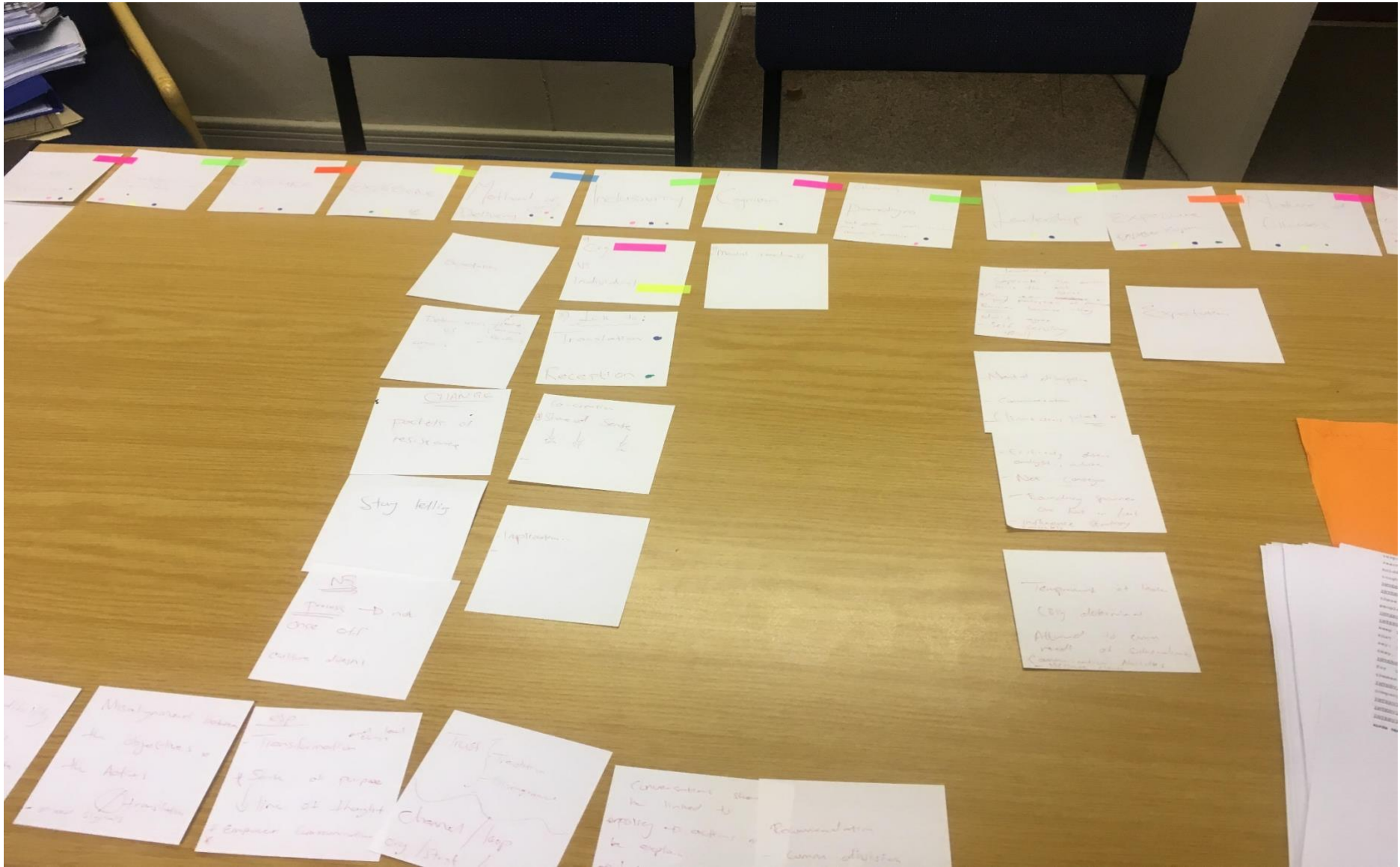
Assumption → lack of
knowledge

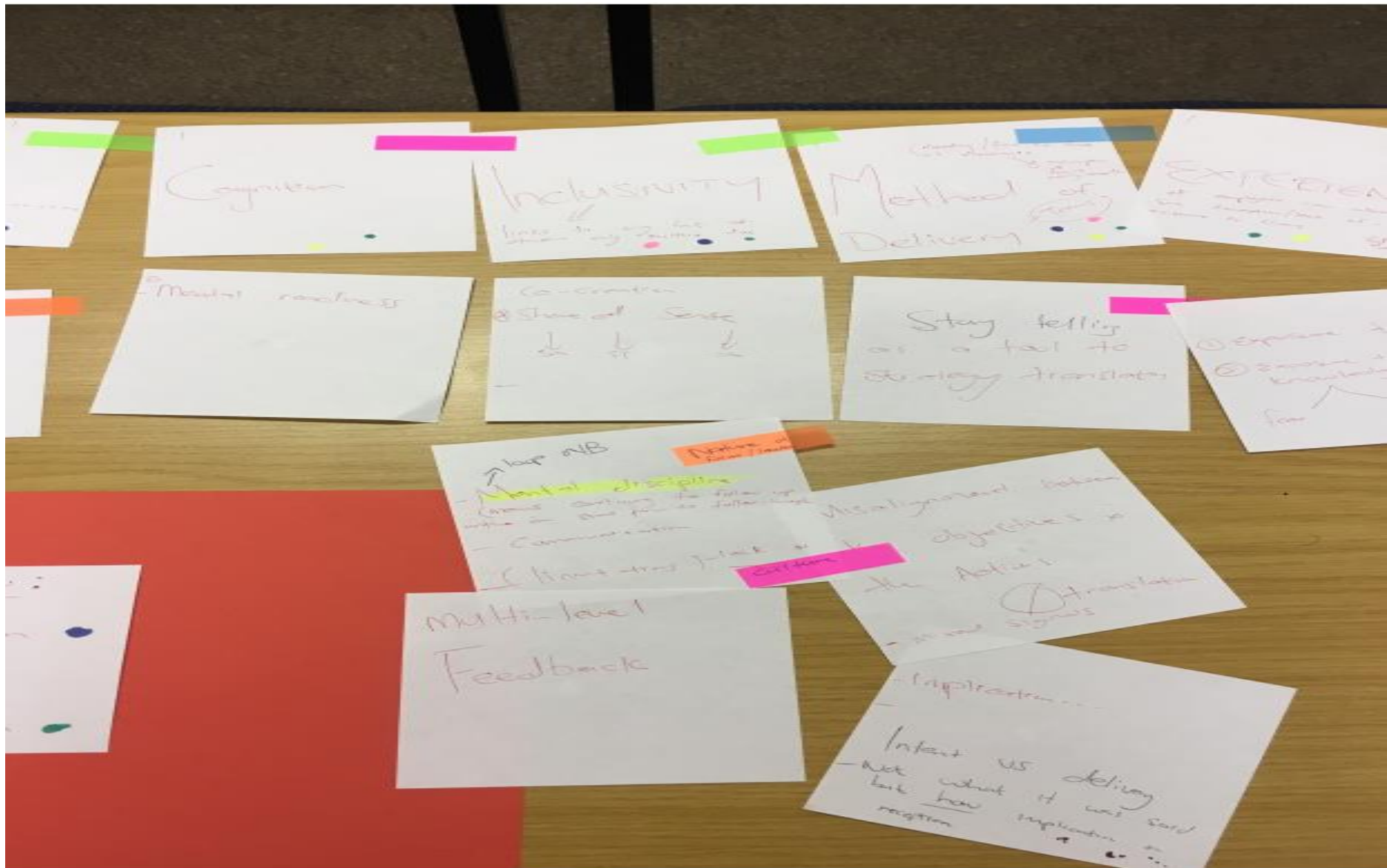
Website - staff don't
know



② 7 Laws of Learning
Green - (systems)

**APPENDIX F:
EXAMPLES OF MANUAL CODING**





**APPENDIX G:
BASIC (INITIAL) MANUAL CODES**

Theme	Codes	Second Level Codes
Distractors of strategy	Competition Overprotective Shield Market noise Hierarchy Frustration and stress	No understanding Distrust of some people Too many levels System unforgiving
Enablers or contributors of translation	Teaching Know direction Empower Listening Transparency	Method of instruction matters One must be able to do it alone Clarity of the message A to need hear people out
Nature of followers	Participation Fear Unrelenting Willing Competence Imposter syndrome	Some people are passive Learning Scared of making mistakes and being caught out
Exposure to strategic activities	Context Practical Allowance	Know why things are done

Theme	Codes	Second Level Codes
Leadership as a translation driver	Facilitation Role played Teach Lead by example Hero worship Interactive Encourage Influence Good judgement Trust Humility	<p>The leader must offer guidance to sub-ordinates</p> <p>Some people will follow the leader instead of concept</p> <p>Trust in a leader can affect how things are done or perceived</p>
Organisation paradigm	Change Flexible Hierarchy	<p>The structure of organisation can affect how things are done</p>
Cognition influence	Assume Lack of contact Blank Understanding strategy	<p>Easy to make assumptions</p> <p>How you think affects how you see or understand</p>
Inclusivity	Shared pressure Recognition Non-isolation Accountable Involvement	<p>Including people in decisions helps people stick together</p> <p>People can take responsibility</p>

Theme	Codes	Second Level Codes
Method of delivery	Story Appropriate Force Monotony Electronic Poor communication 'Death by PowerPoint' Clarity of message	How the strategic message is shared/delivered
Experience factor	Wisdom Backwards Time breeds knowledge	Years of working in strategy
Culture role	Define success Develop	The organisational culture
Change interpretation	Business changes we must change	Perception of change / Strategy evolves
Organisational structure	Steep structure Flexible Top down Open Size Silo mentality	Hierarchy has an influence on how strategy is translated Structure

Theme	Codes	Second Level Codes
Expectation management	Manage expectation (external and internal)	Important to know what is expected
Strategic conversation	Communicate Absent Unclear Feedback Method Teamwork	What conversations are being had?
Feedback?		What role does feedback play?
Other		

**APPENDIX H:
INDUCTIVE CODES:
ROLE PLAYED IN STRATEGIC MANAGEMENT PROCESS**

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
B1	<p>So, I believe my job now is to enrich... in the second half of my life, it is to enrich younger people. The experience and mistakes and stuff, help them not to make it. To teach them through business how to do it. It's about real empowerment 'not bullshit' empowerment. How do we take people, teach them to fish and they can think for themselves and they run a business themselves? My role in the strategic management process, is from formulation all the way down to implementation.</p> <p><i>(Formulation and implementation.)</i></p>	<p>Yes.</p> <p>Clear understanding of their role.</p> <p>Able to articulate.</p>
B2	<p>Definitely when we do the planning and the formulation of the planning, including getting it out to the staff and definitely up to the point of executing it, executing it and report back on whether or not we actually achieved what we hoped to do inside the strategy.</p> <p><i>(Formulation and Implementation.)</i></p>	<p>Yes.</p> <p>Relative understanding of the role.</p>
B3	<p>I would say more under implementation. Formulation in the sense of new procedures, if we identify a risk or somewhere in the company where we are lacking then I would be brought in to formulate procedures, official procedures, step by step for instance.</p> <p><i>(Formulation and Implementation.)</i></p>	<p>Yes.</p> <p>Relative understanding of the role.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
B4	<p>We do not really have like a proper structured routine, I think for me I would sort of like... 'fall in.' So, I would see: 'Okay this is their outlook and then I am okay, I think I can focus on 'How?' here.'</p> <p>(Implementation).</p>	<p>No.</p> <p>No clear understanding of their role.</p>
B5	<p>A big role, because I believe that company that we see out there, it started small to be big. So, at the end of the day, the seed is what made the tree that you see out there. I have seen it, like these people that you think don't know anything, they actually know a lot and you can actually benefit from them just by listening to them and you are like: 'Oh yes, I was thinking that way – (speaking simultaneously) you see what I mean? So, the impact is huge, it's huge, it's big. Involved in formulation and implementation: So, I do analyse those different divisions within the company, our functional areas that I have access to analyse, what can we achieve. And, from there, my people in my division, do they have the capacity to think like this or do like this? Because one of my biggest disadvantages now is I want to ... (indistinct) but I can't, because I am working with older people. So, too much stuff at the same time is going to confuse them and it's going to be trouble. So, I look at them also, do they have the capacity to take this. If "Yes... Okay, how soon or how should I bring it in, how soon or how should I. If no, then I don't even like, no they are going to – it can't work, especially when it comes to technology-wise. I think of it now, it won't work out.</p> <p>(Formulation and Implementation.)</p>	<p>Yes.</p> <p>Clear understanding of the role.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
B6	<i>(Implementation.)</i>	<p>Yes.</p> <p>They have no choice but understand that there are tasks that need to be completed.</p>
B7	<i>(Implementation.)</i>	<p>Yes.</p> <p>They have no choice but understand that there are tasks that need to be completed.</p>
B8	<i>(Implementation.)</i>	<p>Yes.</p> <p>They have no choice but understand that there are tasks that need to be completed.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
B9	<i>(Implementation.)</i>	<p>Yes.</p> <p>They have no choice but understand that there are tasks that need to be completed.</p>
B10	<i>(Implementation.)</i>	<p>Yes.</p> <p>They have no choice but understand that there are tasks that need to be completed.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
M1	<p>From a role perspective I think the first thing is that he must understand (the 'double') that he is in the business of unlocking people's potential, so that will require him to spend sufficient time to understand the strengths and the weaknesses of his team, make sure that the strengths complement each other and that he finds the appropriate mechanism or approach to get people to bring their best version to work, so unlock potential. The second is to, I suppose be the key facilitator of setting direction and that's quite an active role, that's not just a facilitator role, that's being very active in the process of setting direction. So, that's a function of understanding firstly what the key shareholder expectations are of the business, so how is success defined. Understand that in the context of what the capabilities are that you require to achieve success. Understand how that relates to what happens in the industry, relative to your competitors. So, it does – the definition of success and the capabilities you have give, you a fair chance relative to what competitors have to offer to be successful. Thirdly, once you have set that direction, you understand the capabilities, you know how success will be measured, is to understand in the implementation of the respective plans that you make with your team. What hindrances or obstacles are there in the way of that and to be a very strong remover of hurdles or obstacles. And I suppose sometimes be a shield to protect the business from some of the noise coming from the market or internally. And that sometimes is a role that very few people understand and as a CEO I think you need to be – you know sometimes you are a shield, sometimes you are a filter and sometimes they must feel the 'burn'. big part of your role is then further to – I suppose the first one of unlocking potential is to create an environment where people will be successful and that speaks to really setting the correct example as a leader and understanding the role that you play in how culture develops in the business. So, I think I may have used one of my favourite Emerson quotes yesterday: "What you do is so <i>loud</i> I cannot <i>hear</i> what you are saying."</p> <p>(Formulation and Implementation.)</p>	<p>Yes.</p> <p>Clear understanding of their role.</p> <p>Able to articulate.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
M2	<p>Figuring out the 'how?' (rephrased question)... Well... sort of motivating the 'Why?'... But sort of implementing the 'How?'... I think is more where my level of management lies.</p> <p><i>(Unclear.)</i></p>	<p>No.</p> <p>Not a very clear understanding.</p>
M3	<p>Formulation. You see, in an operational role, it's a bit different. I would say to your actuarial or your IT role or your HR role on an Exco level because you go deep into, not just the formalising but the landing of the strategy and sometimes plays a critical role in the execution of the strategy as well.</p> <p><i>(Formulation).</i></p>	<p>Yes.</p> <p>Clear understanding of their role. Able to articulate.</p>
M4	<p>I think both (formulation and implementation). I think when it came to formulation the finance view and the forecasting etcetera on what our future view is of the company was very important. And when I say that is specifically because we had various scenarios floating around to formulate the strategy, so that listen here if we do X it will result in Y. If we do Y it will result in Z. If we take this route, this is what it will look like from a short as well as longer-term perspective. And now that our strategy has been bedded down saying: 'These are our strategic objectives or sort of milestones in the short- to medium-term, from a finance side it's to track against that, to see what now and what the plans of the business are, to put those two together what does the future look like? And then, that's reported on an EXCO level every month based on what we see from the finance side, to be interrogated for the strategic decisions to be made, to see whether there are any 'red flags' and so forth.'</p> <p><i>(Formulation and Implementation.)</i></p>	<p>Yes.</p> <p>Clear understanding of their role.</p> <p>Able to articulate.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
M5	<p>Our business problem is quite easy at the moment, meaning the outcomes we need to solve is fairly defined, which makes a strategy to get there easier. I suppose if we didn't have the clarity of what we needed to achieve, then our strategy would have been difficult, or more difficult to come up with.</p> <p>So, my role in that is to support the plans that are being tabled and to assess whether the various plans that are being tabled will actually get us there. The business is in a loss-making position. It's pretty evident that we need to get it in a profit position, otherwise we will lose support of our shareholder. So, it's sort of a survival strategy. So, that's not something that you formulate, it's something that you know has to happen. So, if you are asking whether I know it has to happen, I know that.</p> <p>I am part of the team who agrees and admit that that's the situation that we are in and who are trying to translate that to the rest of the business to say what plans can we make to achieve this survival.</p> <p><i>(Formulation and Implementation.)</i></p>	<p>Yes.</p> <p>Clear understanding of their role. Able to articulate.</p>
M6	<p>I would say it's probably 80 % implementation once the message has been passed down you need to make sure that you get the job done. That 20 % formulation would just come down to how I get my team to work and the manner to achieve that.</p> <p>For me the best way to do it is just to convince them that: 'Okay, you need to do this and this is how...' – obviously we are doing it, it is not just a case of: 'Do this because I told you'... because that for me <u>almost never works</u>. Yes... so, it's more around passing the message down and convincing my team that this is the right thing to do.</p> <p><i>(Formulation and Implementation.)</i></p>	<p>Yes.</p> <p>Clear understanding of their role. Able to articulate.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
M7	<p>So, I think the role that I am playing in our senior management level is to tell, to break it down in a story, so that everybody understands it in my team.</p> <p><i>(Formulation and Implementation.)</i></p>	<p>No.</p> <p>It's not so clear on their role.</p>
M8	<p>So, I think from an Exco level obviously they have more insight as to what is happening in the country, in the world, in terms of insurance, the risk and the opportunities. I think from my level it is to look at what I do. So, more or less saying: 'We need to achieve this. These are my enablers, but what are the things that are going to prevent me from activating my enablers to help me to get to achieve my target?' So, for example, at the moment the petrol price hike you know, so I see it not necessarily as a bad thing. [Really?] We can use it as a selling tool because if you save a client a R100 on his short-term insurance, that is going to cover his increased petrol cost.</p> <p><i>(Formulation but largely Implementation.)</i></p>	<p>Yes.</p> <p>Relative understanding of the role.</p>
M9	<p>So, my role is to look for opportunities within the market, both from a product and a distribution perspective. So, my role is to identify those opportunities, bring those opportunities to the table. To an extent ensure that they are executed and delivered on and then monitoring progress and benefit out of those. So, in essence it is to help the business grow.</p> <p><i>(Formulation and Implementation.)</i></p>	<p>Yes.</p> <p>Relative understanding of the role.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
M10	<p>So, Organisation 2 as a company comes up with a strategy for, organisation. That strategy then needs to filter down into the different environments like an organisation. So, we look at what organisation strategy is and we then put something together that supports that particular strategy. So, I would be part of the formulation of the organisation strategy that supports the Organisation 2 strategy. What we are doing is implementing. So, we are coming up with measures and things to do around how do we hit that strategy. So, although we are putting a strategy together it is really ultimately something that we want to do for our environment that feeds into that strategy. But in terms of formulation at an Organisation 2 level I would be involved in that from a formulation perspective. So, I suppose formulation and implementation within this environment.</p> <p><i>(Formulation and Implementation.)</i></p>	<p>Yes.</p> <p>Relative understanding of the role.</p>
M11	<p>So, there're different levels... so, we have the leadership summit, well... not summit, but leadership session where we get to play a part in the actual strategy. That's once or twice a year. Then there is with my direct head, we will sit and our group strategises and we will do our own strategy... And then, in the smaller, my own department I have to have to my own strategy, how we link into it.</p> <p><i>(Formulation of own strategy but implementation of Organisation 2's strategy.)</i></p>	<p>Yes.</p> <p>Relative understanding of the role.</p>

Respondent	Role in strategic Management Process	Indication of whether or not they understand their role Yes / No
M12	<p>The role I play now is I am pretty much a receiver of strategy and translating it. In terms of how we execute and what we execute. So, for me it's difficult to say how I would do it here, but for me in previous experiences, I think coming back to really what is happening in the IT and your competitor – IT, innovative, competitor and regulatory environment. For me that was one of the key understandings we had to have in terms of themes to understand where we are going to be limited and what we need to take into account.</p> <p><i>(Formulation and Implementation.)</i></p>	<p>Yes.</p> <p>Relative understanding of the role.</p>
M13	<p>My role is to operationalise and evaluate the strategy and come up with enablers/initiatives to help us attain our objectives.</p> <p><i>(Implementation.)</i></p>	<p>Yes.</p> <p>Relative understanding of the role.</p>

**APPENDIX I:
DEDUCTIVE CODES LINKED TO FRAMEWORK**

Sense reception elements (Pre-constructed)	Extra(s): Found in interviews	Checks (Used)	Verified
Buy-in (ownership) of the strategy	Mentorship and training (Invalid as stand-alone but can aid reception)	1. Presence in interviews (quotes)	✓
Personalisation of the strategy (receiver's personal meaning making)	Simplification (Invalid as reception elements but can aid sense giving)	2. Acknowledged by participants	✓
<ul style="list-style-type: none"> • Unique application (contextual) 			
<ul style="list-style-type: none"> • Modified enactment 			
<ul style="list-style-type: none"> • Accurate (renditioning) of the strategy 			

Buy-in of the strategy	Personalisation of the strategy (receiver's personal meaning making)	Unique application (contextual)	Modified enactment
Organisation 1			
B1 ✓	B1 ✓	B1 ✓	B1 ✓
B2 ✓	B2 ✓	B2 ✓	B2 ✓
B3 ✓	B3 ✓	B3 ✓	B3 ✓
B4 ✓	B4 ✓	B4 ✓	B4 ✓
B5 ✓	B5 ✓	B5 ✓	B5 ✓
B6 ✓	B6 ✓	B6 ✓	B6 ✓
B7	B7	Not interviewed. Data collected from presentation	Not interviewed. Data collected from presentation
B8	B8	Not interviewed. Data collected from presentation	Not interviewed. Data collected from presentation
B9	B9	Not interviewed. Data collected from presentation	Not interviewed. Data collected from presentation
B10	B10	Not interviewed. Data collected from presentation	Not interviewed. Data collected from presentation

Buy-in of the strategy	Personalisation of the strategy (receiver's personal meaning making)	Unique application (contextual)	Modified enactment
Organisation 2			
M1 ✓	M1 ✓	M1 ✓	M1 ✓
M2 ✓	M2 ✓	M2 ✓	M2 ✓
M3 ✓	M3 ✓	M3 ✓	M3 ✓
M4 ✓	M4 ✓	M4 ✓	M4 ✓
M5 ✓	M5 ✓	M5 ✓	M5 ✓
M6 ✓	M6 ✓	M6 ✓	M6 ✓
M7 ✓	M7 ✓	M7 ✓	M7 ✓
M8 ✓	M8 ✓	M8 ✓	M8 ✓
M9 ✓	M9 ✓	M9 ✓	M9 ✓
M10 ✓	M10 ✓	M10 ✓	M10 ✓
M11 ✓	M11 ✓	M11 ✓	M11 ✓
M12 ✓	M12 ✓	M12 ✓	M12 ✓
M13 ✓	M13 ✓	M13 ✓	M13 ✓

**APPENDIX J:
SAMPLE OF INDUCTIVE BASIC CODES**

Theme	Code description	Basic code
Change interpretation	<p>Developing anything takes time. Business changes and, as such, the outlook should change. Important to interpret effectively what change will mean to employees in line with the strategy.</p> <p>Business changes effect strategy. Flexibility and resilience are critical. A change in mindset may also be necessary.</p>	<p>Develop</p> <p>Business changes</p>
Cognition influence	<p>Assumptions are dangerous when translating a strategy as it can lead to a lot of bad moves. Verify instead of assuming.</p> <p>It is essential to know what is it that people understand about strategy and if there is a no understanding, leaders must find a way to generate an understanding</p>	<p>Assume</p> <p>Understanding (strategy)</p>
Distractors of strategy (barriers)	<p>Competition evasive or focused</p> <p>Overprotective leader (no space for learning)</p> <p>Hierarchy (too steep creates a barrier to translation)</p> <p>Basic distractor (other types identified)</p> <p>Frustration due to complexities or other factors</p>	<p>Competition</p> <p>Overprotective leader</p> <p>Hierarchy</p> <p>Basic distractor</p> <p>Frustration</p>

Theme	Code description	Basic code
Enablers or contributors of translation	<p>Teaching is a tool to translate strategy better</p> <p>Know direction company is going in (feeds into strategy)</p> <p>Empower employees so to create better buy-in</p> <p>Listening is key to decipher gaps in employee cognitive needs or abilities</p> <p>Basic Enabler (environment-the organisation itself)</p> <p>Leader can act as a key enabler based on leadership style</p> <p>Transparency allows for of translated strategy and employees understand where they fit in</p>	<p>Teaching</p> <p>Know direction</p> <p>Empower</p> <p>Listening</p> <p>Basic Enabler (environment)</p> <p>Leader</p> <p>Transparency</p>
Expectation management	<p>Manage expectations allows all parties involved to clearly understand and articulate their roles</p>	<p>Manage expectation (external and internal)</p>
Experience factor	<p>Wisdom comes from years of experience and from having "lived" many situations. It should not be disregarded.</p> <p>Understating strategy, finding ways to translate your strategy takes time and learning takes time.</p>	<p>Wisdom</p> <p>Time breeds knowledge</p>
Exposure to strategy activities	<p>Practical exposure to strategic objectives versus training or just being told about strategy.</p> <p>Involvement of staff in strategy (as far as is applicable).</p>	<p>Practical</p> <p>Involvement</p>

Theme	Code description	Basic code
Feedback	Critical, essential, irrefutable	Need to know the route
Goal orientated	Define "success" to employees... else they do not know what they are working towards.	Define success
Inclusivity	<p>Shared pressure means shared learning. People are more likely to be more accountable if they can rely on each other.</p> <p>Recognition of people and their efforts makes them feel more included.</p> <p>Non-isolation is important. Strategy is daunting to many so by including people there is a sense of belonging and thus understanding how they fit into the bigger picture.</p> <p>When people are included they are more likely to be accountable.</p> <p>Responsibility comes with understanding your role in the organisation.</p> <p>Being included enables appropriate responses to the strategy.</p>	<p>Shared pressure</p> <p>Recognition</p> <p>Non-isolation</p> <p>Accountability</p> <p>Responsibility</p> <p>Response ability</p>

Theme	Code description	Basic code
Leadership as a translation driver	<p>Leaders should act facilitators of strategy and not do all the work</p> <p>Role played by leaders is a very important one as they aid in the understanding of strategy as sense givers and meaning makers of strategy</p> <p>Teaching is critical as it is way to guide followers and allow them to eventually become competent and understand strategy to the point of application.</p> <p>Followers learn by seeing and a leader must remain true to the values and lead by example</p> <p>Hero worshipping is a thing of the past. Leaders must approach the sharing of a strategy message as something that benefits all parties involved. Hero worship can lead to a bigger gap in interaction and communication.</p> <p>Strategy is Interactive and in translating a strategy in it important to know that it is not a one-way street.</p> <p>Leaders must encourage employees to do more, be more hands on and encourage involvement in strategic initiatives.</p> <p>Leaders must use their influence in a good way. They have a great influence on how followers perceive strategy.</p> <p>Good judgement must be executed when trying to understand whether or not the message is getting through and whether or not a follower will be able to receive the strategy.</p>	<p>Facilitation</p> <p>Role played</p> <p>Teaching</p> <p>Lead by example</p> <p>Hero worship</p> <p>Interactive</p> <p>Encourage</p> <p>Influence</p> <p>Good judgement</p>

Theme	Code description	Basic code
	<p>Trust is essential in strategy translation. If they trust you, they trust your judgement and decision making and trust that you will lead them down the right path.</p> <p>Trust is also vital as it allows followers to be free to state what they do or don't like or understand.</p> <p>Leaders act as a shield against certain toxic information. Not all information should be shared with everyone</p> <p>By filtering some of the "noise" a leader can effectively translate a strategy to sub-ordinates.</p> <p>Humility is essential in any organisation. More so from the leaders side as it shows a willingness to accept flaws and to learn from others. A lack of humility can lead to hostility from followers.</p>	<p>Trust</p> <p>Shield</p> <p>Filter</p> <p>Humility</p>
Method of delivery	<p>Story-telling is an essential tool to delivering a strategy message.</p> <p>It's important that the appropriate method of translating a strategy be used (it is all about how the message is sent).</p> <p>Monotony in the delivery of a strategy can cause people to become disengaged.</p> <p>'Death by PowerPoint' – find more innovative and engaging ways to tell the story.</p> <p>Poor / ineffective communication can easily be a barrier to translation of a strategy.</p>	<p>Story</p> <p>Appropriate</p> <p>Monotony</p> <p>'Death by PowerPoint'</p> <p>Poor/ineffective communication</p>

Theme	Code description	Basic code
Nature of followers	<p>Participative followers show an eagerness to learn and will find it easier to learn by doing.</p> <p>Fear driven followers may become paralysed by fear and this fear may be a block to translation</p> <p>Willing to learn and accept change</p> <p>Competent followers are easily filtered from the incompetent when it comes to renditioning or actioning of a strategy</p> <p>Recognition of employees and their contribution drives action and motivates staff to want to do more</p> <p>Imposter syndrome becomes evident when the time for implementation comes. Many people fake understanding instead of stating outright that they don't understand for fear of "being caught out". Lack of knowledge may be confused with inability to perform.</p> <p>Context of the strategy to their jobs is important to followers as it guides action and understanding (they want to understand how the strategy fits into their job)</p>	<p>Participation</p> <p>Fear</p> <p>Willingness</p> <p>Competence</p> <p>Recognition</p> <p>Imposter syndrome</p> <p>Context</p>
Organisation paradigm	<p>Change can be deterred by an organisation whose structure is inflexible</p> <p>Hierarchy can cause a lag or lack of translation specifically when it comes to feedback</p>	<p>Change</p> <p>Hierarchy</p>

Theme	Code description	Basic code
Organisational structure	<p>Flexible management means people are more at ease with new things and feel at ease with addressing concerns</p> <p>Top down should not be seen as the be it and end all as it can limit feedback and interaction among the management levels</p> <p>An open structure allows for open learning, teaching and conversation</p> <p>Silo mentality is the result of a heavily layered structure wherein there is no interaction between the divisions or levels</p>	<p>Flexible</p> <p>Top down</p> <p>Open</p> <p>Silo mentality</p>
Strategy-based conversation	<p>Communicate the strategy through conversation. If none is happening find out why and how to encourage people in the organisation to engage on a strategic level.</p> <p>This will allow for any ambiguity to be cleared up.</p> <p>Strategic conversation allows for feedback regarding the strategy</p> <p>The method used to have these conversations is important as it in essence becomes a vehicle for translation.</p> <p>Team building happens almost organically when such conversations are had.</p>	<p>Communicate</p> <p>Unclear (if)</p> <p>Feedback</p> <p>Method</p> <p>Team building</p>

**APPENDIX K:
SAMPLE OF INDUCTIVE CODES
INVESTIGATING BASIC
PRINCIPLES AND MEANING OF STRATEGY**

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
B1	Flat, open	<p>“We normally on a weekly basis have our management, our Exco meetings and we have got one just after this [interview]. Again, my team and I sit in from Skype in George because I live in George. We discuss the operations side and say: ‘Okay, how is that going to influence the strategy?’”</p>
B2	Relatively flat, open (but layered)	<p>“It is mostly divisional based. So, what happens is our management committee would actually have a Strategy session. Round about September/October we had a big one for last year. We said: ‘Okay, this is our main strategy meeting for our planning for 2018.’ From there we also set up the budgets and the whole works.</p> <p>“Out of each one of those in every division of the company we would have a head of a division. Any major strategies like how we do tenders or how we go about trying, defeating the opposition out there, stuff like that would be managed or communicated to those people and not necessarily to all of the other staff around it.</p> <p>“<u>Informally, yes, they are all aware of it.</u> It is not a hidden strategy by any means but I think the formal communication stops at that next level of people.”</p>

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
B3	Flat, open	“Lucky, I have got that relationship with the interns where they come to me direct. So, there is no sort of hierarchy.”
B4	Flat, open	“I do not think so [understand].”
B5	Flat, open but heavily layered!!!	“I think, from what I see, is everything goes past B2 . I can say the way it started is because I report to B2 which is very high, top-management level. So, I had to go to him first and then he is like: ‘We will look into it.’ He had to involve HR , because people have to be informed. Then he had to involve B1 as well as directors of the company, because they have to know what is about to happen. So, they went through it.”

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
B6	Flat, open	<p>“Almost everything that we do here... everything is interlinked. What we do is that we sit down and we discuss how we find a way on... how to... how it’s best for us to solve those problems. But, most of the time, we firstly include management and then we also include the manager downstairs, because we avoid trying to implement something that is not going to be feasible for people who are working downstairs.</p> <p>“He explains: ‘Okay, this is something that we suggested that we are going to implement.’ Obviously, he allows each and every one of them to agree to it. If they don’t agree to it, they basically say: ‘Okay, what do you think we can do better?’ Because, in a sense I would look at it... if we implement the strategy it’s basically going to look easy on my side, because I am not the one who does the work. So, if I get a perspective of someone who actually does the work, then I can understand. Because not in a sense that... because we went to school we know better, but they are the ones that actually do the job.”</p>
B7 Presentation	Unclear	N/A

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
B8 Presentation	Unclear	N/A
B9 Presentation	Unclear	N/A
B10 Presentation	Unclear	N/A

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
M1	Segmented, Steep but open	<p>“I [CEO] have sessions with the respective groups of leaders as well. So, team managers we will do together, we will do operational middle management together, support managers together and then the level just below the Exco together.</p> <p>“But I will go through the same exercise and then on a quarterly basis with the executive and the level below and the key project managers in the business. We also revisit strategy, strategy progress and, obviously, it’s also a way for me to <u>see whether people understand</u>, but it’s there where we sort of make tactical adjustments to what it is that we do. But, that would be preceded by quite robust Exco discussions that give me a little bit of a direction in terms of what the leadership team feels the right things are that we must do. I sometimes use a little bit of my own influence to focus it a little bit where I think we are missing.”</p>
M2	Segmented, Steep but open	<p>“We don't have a strategy management team, we have Exco, Manco and then managers and sort of the flow of the hierarchy. Obviously, in terms of <u>strategy</u>, our strategy is worked out on what we need to achieve for this year, or for the next five years and then broken up into yearly targets and things that we need to do to achieve and that’s then filtered down in ways that we hope people understand.”</p>

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
M3	Segmented, Steep but open	“So, I sit on Exco and then reporting to me I have three heads reporting to me, that’s the Head of Claims and Services, the Head of Sales and the Head of Claim Support. It entails all of the operational areas, so sales, claims, services, legal, procurement, investigations, everything.”
M4	Segmented, Steep but open (middle up)	“I think the reality from the finance side is we provide the input and say: ‘This is what it will look like, these are the scenarios, etcetera, and then really it’s more from a senior executive perspective like M1 and our senior Exco members to decide on the strategy, based on the input that we provided; based on the input that actuaries provided; based on the input that the operational people provided. So, it’s really sort of assisting in the information gathering and then our Exco level makes the call. And then, once they have made the call, it’s for us to track progress against those calls and what we currently see.”
M5	Segmented, Steep but open	“As a business what we try to do is first we get the senior leadership of the business together, so a bit wider than just the executive committee. So, you involve key senior management as well. We then share, present how we have constructed the context of where we are... so both external and internal.”

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
M6	Segmented, Steep but open	“I understand the reporting structures from myself all the way up to, say, the Head of our Department and he then reports to M1 as the CEO of our division. So, those structures I understand very well.”
M7	Segmented, Steep but open	“Exco ... it is there that they would have done the strategy.”
M8	Segmented, Steep but open	“ Not really, no. So, I know it is done on an Exco level and Manco together and this is what we need to achieve and then we get the... you know... as it filters down. But who is involved in that process I am not 100 % sure. ”

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
M9	Segmented, Steep but open	<p>“For a business like this we would start off with a bit of an opportunity assessment part first, which would be socialised with – so the engagement would happen with most of the stakeholders of the business. Proposal would go to an Exco. But, on the Exco, you know there are many representatives... from sales to operations, to IT systems, to claims, to finance, you know... there is a very wide functional representation of stakeholders, which would be Exco plus Manco plus all project managers.</p> <p>“We sit in a room and we debate to say we have space for only 20 projects. Which are the highest priority in the context of our overall strategic objectives as well as the resources we have available? Which are the correct ones to pursue?”</p>
M10	Segmented, Steep but open	<p>“Typically, our process would be one of the Exco gets together. We have an intense discussion and we challenge them very robustly around where it is that we are going and where we are taking this business. Similarly, once everybody understands what the Organisation 2 strategy is, is then to go into our different environments again to go and look at your environment and then have the discussion with your teams on how we fit or how we feed into Organisation 2 and then, ultimately, how Organisation 2 wants to do it.”</p>

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
M11	Segmented, Steep but open	<p>“So, you get the bigger, let’s just call that Organisation 2, Organisation 2’s short-term division, that’s the bigger, insight, into the group’s strategy. Then there are the heads and in that division there would be services, but that’s client care, claims and retentions.</p> <p>“Then M8 who is sales and all divisions of sales and then you get M11 who is legal, car hire, salvage, procurement, investigations – so he has his division.</p> <p>“And we will talk about it and I think the heads, they have their heads meeting and they will rather strategise how they need to link in. We sit and we will sit with client services and they will bring over what is the strategy of the other departments. How should we help sales, should we get leads for them, is there a way that claims can, when we give good service, relate...?”</p>
M12	Segmented, Steep but relatively open	<p>“So, I think that limited response comes from the fact that we always operate within another strategy. So, the strategy is overall set by Organisation 2 Head Office and its divisions in this case. There is a growth strategy for Organisation 2 Head Office which we are playing and that we already had to adopt and adapt. So, you do not create this from scratch.”</p>

Participant	Summary of Question: Understands Basic Strategy Management Levels (setup)	Direct Quotes / Answers
M13	Segmented, Steep but open	<p>“I am going to make reference to Organisation 2 and the composition of the business to make sense of your question, we have Operations and Support and the management structure in the operations is as follows:</p> <p>“We use external analysis to determine factors in play that could impact our business in future and our ability to realise our strategy. For us to envision growth, we need to assess business trends, the effects of regulatory and or legislation to future growth. For instance, the impact of non-compliance to the new ‘fit and proper’ requirement from the FSC would compromise our ability to render services. The analysis will help you determine enablers and gaps to your proposed strategy.”</p>

Participant	Summary of Question: Understands Meaning of Strategy	Direct Quotes / Answers	Code
B1	Direction	<p>“The strategy is done at the top. It is communicated down. But strategy can be rigid, okay. Strategy is only... it says that is the direction, it is not saying: ‘Take the R21’ or: ‘Take the N1. It says go north.’ Okay. Now, because business changes so fast, if you get a – how can I say – a road blockage let us say here by the airport, then you have got to go through Tembisa to get on the N1 to still go to Polokwane. You have got to make that change in your route. But that change in route happens at the bottom. The line of communication has to be open.”</p>	Top down
B2	Operation driven	<p>“How do you do some things? Do you decide on a formula for doing something? How do you decide? How will you do this? How do you implement it?”</p>	
B3	Planning focused	<p>“Knowledge on strategy specifically, no. As a chapter in my studies, yes. For me personally it would mean planning... focus on planning. So, I would usually start off with a mind map and then point form and follow through from there.”</p>	

Participant	Summary of Question: Understands Meaning of Strategy	Direct Quotes / Answers	Code
B4	Planning focused	“Yes, I think ‘complications.’ Yes, I think really complicated, in-depth thinking, planning, yes.”	
B5	Person centrality	“So, B2, based on what he wants to achieve with the company, he picks up the links who to talk to, to overlook a certain division. And then from there he gives you the opportunity to go into it in a sense of finding ways to improve whatever needs to be improved. Again, so it’s a matter of – I can say it’s a two-way thing. Because I report to him, he is the one who comes with new things in a way, how things should be done but, for the past few months... past six months, let me say the whole of this year, most of the strategies are behind what processes are being derived from, was basically me, because I see what I am doing and then I see the mistake it’s causing... or I see the cost implications of what they are doing and then I realise: ‘No, this is not the correct way to do this.’”	
B6	Vague, but recognise tactics	“Strategy for me... basically I just think of something different, something that hasn’t been implemented before and when it’s implemented it has to have an advantage over... like all others... your competitors basically. It’s something that you need to plan, it has steps and all those steps are fulfilled in a certain way. That’s my understanding of strategy.”	How

Participant	Summary of Question: Understands Meaning of Strategy	Direct Quotes / Answers	Code
B7	Inter-connectedness	Everything we do affects everyone.	Related
B8	Decision-making based	Understand the implications of not doing certain things. If you make a mistake in one or two, the whole process is wrong.	
B9	Vague	Communicating this stuff as it happens and having a hands-on approach to doing things that have been planned.	
B10	Quoting jargon / Vague	Is an action-driven exercise.	

Participant	Summary of question: Understands Meaning of Strategy	Direct Quotes / Answers	Code
M1	Quoting jargon / Vague	<p>“I wouldn’t say the <i>reason</i> that we exist, because that speaks more to purpose than to strategy, but there is an element of it. So, it is how we translate the reason we exist into something that has value for shareholders and for employees and for clients. And it speaks to how we are going to get there and how we are going to measure whether we are successful in implementing – crudely articulated.”</p>	
M2	Clarity	<p>“It’s a very big picture with very high-level things that you need achieve. So, to me ‘strategy’, when someone says ‘strategy’ I hear the ‘What?’ ‘What’ needs to be done, yes.’ And then when I hear we need to ‘unpack’ strategy initiative. That to me starts becoming the ‘How?’ So, strategy is the ‘Why?’ and the ‘What?’ and when you are told: ‘Now you need to figure out ‘How’ we are going to ‘Unpack this’ or ‘What this means?’ ‘That’s where the ‘How?’ comes in.”</p>	Insight
M3	Quoting jargon / Vague	<p>“Plan. Okay plan, vision, achievement, mission, all of those things.”</p>	

Participant	Summary of question: Understands Meaning of Strategy	Direct Quotes / Answers	Code
M4	Futuristic view	<p>“What comes to mind first of all is I get very excited. I like a strategic view, I think it’s just – sort of from my perspective I like looking into the future. So, perhaps strategy is the forward-looking way. If I hear that there will be strategic change in a company, I am like: ‘Okay cool. What is that going to mean for us from a profitability, cash flow perspective, people perspective, etcetera?’ So, strategy is very much a forward-looking sort of view. You asked what comes to mind... To me it’s the future.”</p>	Top down
M5	Quoting jargon / Vague	<p>“It’s a bit open for interpretation. The way I like to think about it is it’s coming up with a short- to medium-term plan to get to a workable solution for achieving vision.”</p>	Plan
M6	Quoting jargon / Vague	<p>“So, first it sounds like a big word, it sounds like something only the very, very high up people talk about. But, for me it boils down to a plan of what we need to achieve and how we are going to achieve it. Almost what our function or purpose of being here is, what I am working towards.”</p>	Plan

Participant	Summary of question: Understands Meaning of Strategy	Direct Quotes / Answers	Code
M7	Thinking	<p>“So, to me, immediately I would say: ‘The plan to get to the end goal, that is in my layman’s terms to me is... strategy.’ If I need to explain it, I like to explain it in a way to say: ‘The strategy is what we are thinking.’ Strategy is also usually long term and this is basically the plan we have to get to our end goal.”</p>	Plan
M8	Goals	<p>“What we need to do to achieve what we need to achieve over the short-, medium- and long-term. So, what are the enablers, the building blocks we need to put in place?”</p>	Resource application
M9	“Pie vocabulary” / Vague	<p>“One of the connotations attached to strategy is “pie in the sky” kind of stuff. It is a paper exercise that gets buy-in from enough individuals for it to be... for it to be motivating enough to pursue further.</p> <p>“So, when I hear ‘strategy’ I sometimes get a bit nervous in terms of, you know... how well informed the strategy was formulated. Strategy in essence for me should really be not just one thing. It should be a whole bunch of ... like smaller pieces. So, consecutive decisions or actions, but building towards a larger objective.”</p>	

Participant	Summary of question: Understands Meaning of Strategy	Direct Quotes / Answers	Code
M10	“Pie vocabulary”	“I think it is a concept that is over-used. I think it is a word that everybody loves to make themselves come across as very important. And, quite frankly I think a strategy has lost its value over time. So, every time people say the word ‘strategy’, I kind of get into: ‘Oh yes, what are we talking about now again?’ And that is my view, because I really think what people refer to as ‘strategy’ is really just a big word for: ‘Let us go and sit and think for hours of how not to implement something.’”	Meeting
M11	Plan	“It’s what we want to do going forward, that’s where the strategy, what the plan is to execute on.”	
M12	Plan	“Where I want to be and how I intend getting there.”	
M13	Plan	“Action Plan to help us reach our objectives.”	

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes	Code 1
B1	Feedback	“So, that quick adaptations... so that’s customer feedback . Suppliers on the other side and then I have got a number of consultants that work for us as well. The whole marketing PR side is outsourced and it is individuals??”	
B2	Vague	“‘How do my competitors operate?’... and... ‘How do my customers operate and how do they need me to support the way that they operate?’ Things like that [key things]. I always go and measure the price of the guys... I go and measure the geographical layout of the guys... I go and measure their involvement in other projects or other companies.”	
B3	Vague	“External analysis would be: ‘what effect?’ If I make a change on the system, ‘What effect is that going to have on each person in the company?’ Will they be locked out of the system for an hour? If they are locked out, how many orders, how much money are we going to lose? So, that would be my main external focus: ‘What effect is this action going to have on other employees?’”	
B4	Insight	“If I am not sure what is happening outside of the business, I cannot just implement things because, ultimately I am working for people who are going to use my product outside my business. So, I need to understand what is happening around me so that I can plan and implement correctly.”	Connect limited

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes	Code 1
B5	Operation effect	<p>“So, what I normally do is this: ‘To improve something, what effect is it going to have on these people?...’ ‘The procurement people... What effect?’ ‘The finance people as well...’ ‘What effect?’ ‘At the end of the day... The customer, what effect is it going to have?’</p> <p>And then I analyse that alone, like before even communicating with them, just thinking about it... collecting some data, seeing how they are doing things, analysing how soon they complete orders... ‘How soon do they buy?’ ... financial implications, etcetera?”</p>	
B6	Create networks	<p>“Basically, I feel like you can’t start a strategy without doing an external analysis, because you can't do a strategy if you haven’t done an external analysis... only to find that everyone else is doing it. And you do that strategy not knowing that whatever that’s happening in another country is going to affect that strategy, or whatever politics, legislation is going to affect that strategy. So, the first thing that you need to do is... you have to do – firstly, because there is probably someone who had that idea. There’s ‘Google’... everyone knows everything out here. So, if you don't know what everyone else is doing out there ...”</p>	Insight

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes	Code 1
B7		N/A	
B8		N/A	
B9		N/A	
B10		N/A	

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes
M1	Create networks	“Understand how your strategy relates to what happens in the industry, relative to your competitors.”
M2	Create networks	“I have to know what the market is performing like, I need to know what our competitors, what their next move is . We need to understand the customer conduct in the market... ‘What are they looking for?’ ‘What are people buying?’ ‘Are they buying price benefits?’ ‘Is it emotional buyers?’ ‘What frames are we in?’ And, obviously, as the market becomes more saturated that differentiation becomes more imminent.”
M3	Create networks	“I think it’s very important to see what your competitors are doing , so that is your macro environment – it will entail your competitors, but it will also entail what the climate is out there... So, the economy... ‘How will the economy influence your strategy?’ Because you might have a strategy that is totally out of line, out of ‘whack’ with where the economy is going , or where your... I am not always so much into what your competitors are doing.”

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes
M4		<p>“Externally you get sort of viewed on your strategy, not just perhaps our company, but any group company, any listed company, I mean shareholders and people like that have got a vested view, or interest in what your strategy is. So, from an external perspective how you communicate your strategy and how that sort of translates into a future view of the company is very important. I mean you can’t really have an internal strategy that doesn’t read well, or is not understood, or not communicated appropriately externally, especially to your shareholders and wider stakeholders. I mean we can’t have an internal strategy if our key shareholder which is, call it Organisation 2, does not support it or buy-in to it.”</p>
M5	Create networks	<p>“If you follow fairly old concepts of a SWOT analysis then I suppose you need to understand what's happening around you to figure out what you are good at and where you can have a niche, so that I think the biggest thing you want to identify is where the skills and the insights I have is very specific to myself and my environment so that I can figure out where I have a natural advantage. And it’s that where an external assessment can help you quite a bit with what the environment is.”</p>

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes
M6	Jargon	<p>“So, I think for me the most important thing when I hear ‘strategy’ or see ‘strategy’, I need to be able to believe it. So, if let’s say we are trying to – in our context if they say we want to be the biggest insurance company in South Africa, then for me it seems like: ‘Oh wow! You have already lost me there because I mean how are going to do it, where did you come up with this idea, is it achievable, realistic?’</p> <p>“So, if you have any – if you can sort of take someone through the thought process or the research you have done in setting out the strategy, then you almost convince me that this is the right strategy, or the best one that we can achieve.”</p>
M7	Process driven	<p>“External analysis is getting somebody who is not working for you in your own corporation, usually a consulting company coming in and saying: ‘Yes, let us help you guys to get up with a good strategy to get to where you want to be...’ ‘You know, they do analysis and they say: this is where you are currently.’ This is what you need to do to get there and it is usually an external partner which does that kind of thing.”</p>

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes
M8	Unclear	<p>“I am not sure what ‘external’ analysis is. So, it is difficult to – so is that the external people analysing where we need to go and helping us to put up that strategy, or is it ...? I think from my level it is to look at what I do. So, more or less saying: ‘We need to achieve this.’ These are my enablers, but what are the things that are going to prevent me from activating my enablers to help me to achieve my target. So, for example, at the moment, the petrol price hike... you know, so I see it not necessarily as a bad thing.”</p>
M9	Probe deeply	<p>“I think there is always a healthy element of scepticism that needs to be exercised in any analysis. I think it really depends. It depends on... you know, what the... it would depend on exposure to whatever it is that you are trying to achieve. If it is a new market, if it is a new geography, we would be a bit naïve to think that reading up on something could give you the entire picture. And I think in a lot of instances corporates do, rather than engage with experts within the field, so I am just talking about my experience.”</p>

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes
M10	Clarity	<p>“You do need to understand your external environment, you know, to help you navigate to where you need to go to. If you do not understand it, you might obviously hit stumbling blocks. I think it is dependent on that environment that you sit in. So, technology for me would be important around things that are trending.”</p>
M11	Response to competitors	<p>“Yes, I don't think in my role at the moment... No (not relevant). But I believe that it does, there is a lot that comes to mind when you say it. It's not applicable. I don't use it as much in my role, but there's a lot of things when considering claims: ‘Yes, I can analyse what the market is doing, but we still have to do what's right for our company and to check what's going on to look after our loss ratio and make sure our clients are happy.’”</p>
M12	Vague	<p>“So, awareness first of all, because without knowing what is in the different external spaces... So, if you don't understand the political arena or the competitor or regulatory – how would you know what you are putting out if it's going to be realistic or whether it's going to fail. So, for me first of all you need to be very aware, but not necessarily aware to be able to just live up to what is expected, but you want to, as a forerunner, be able to surpass all your limitations to be in front.”</p>

Participant	Summary of Question: How Individuals Use External Analysis to Make Sense of Strategy	Quotes
M13	Insight	<p>“We use external analysis to determine factors in play that could impact our business in future and our ability to realise our strategy. For us to envision growth, we need to assess business trends, the effects of regulatory requirements and / or legislation to future growth. For instance, the impact of non-compliance with the new ‘fit-and-proper’ requirement from the FSC would compromise our ability to render services. The analysis will help you determine enablers and gaps to your proposed strategy.”</p>

**APPENDIX L:
INDUCTIVE CODES INVESTIGATING
SENSE BREAKING OF STRATEGY PROCESSES AND
PRACTICES**

Participant	Applied Sense-breaking Processes and Practices	Quotes
B1	Teach by allowing personal action by sub-ordinates	<p>“So, I believe my job now is to enrich. In the second half of my life, it is to enrich younger people.</p> <p>“The experience and mistakes and stuff: help them not to make them.</p> <p>“To teach them through business how to do it.</p> <p>“It’s about <i>real</i> empowerment, not <i>bullshit</i> empowerment.</p> <p>“How do we take people, teach them to fish and they can think for themselves and they run a business themselves.</p> <p>“My role in the strategic management process, is from <i>formulation</i> all the way down to <i>implementation.</i>”</p>
B2	Ensure effective feedback following planning processes	<p>“Definitely when we do the planning and the formulation of the planning, including getting it out to the guys and definitely up to the point of executing it, executing it and reporting back on it, did we actually achieve what we hoped to do inside the strategy.”</p>

Participant	Applied Sense-breaking Processes and Practices	Quotes
B3	Systematic process of informing through procedures	<p>“I would say more under ‘implementation.’</p> <p>“Formulation in the sense of new ‘procedures’, if we identify a risk or somewhere in the company where we are lacking then I would be brought in to ‘formulate procedures, official procedures, step-by-step for instance.’”</p>
B4	Uncertain due to a lack of structure	<p>“We do not really have a proper structured routine.</p> <p>“I think for me I would sort of like ‘fall in.’ So, I would see: ‘Okay, this is their outlook and then I am okay... I think I can focus on how, here.’”</p>

Participant	Applied Sense-breaking Processes and Practices	Quotes
B5	Contextualise strategy message prior to delivery	<p>“A big role, because I believe that the company that we see out there, it started small to be big. So, at the end of the day, the seed is what made the tree that you see out there. I have seen it, like these people that you think don’t know anything, they actually know a lot and you can actually benefit from them just by listening to them and you are like: ‘Oh yes, I was thinking that way... [speaking simultaneously]... you see what I mean?’</p> <p>“So, the impact is huge, it’s huge, it’s big.</p> <p>“Involved in formulation and implementation:</p> <p>“So, I do analyse those different divisions within the company, our functional areas that I have access to analyse...what can we achieve?...</p> <p>“And from there... my people in my division... do they have the capacity to think like this or do like this?... Because one of my biggest disadvantages now is I want to ... [indistinct] but I can’t, because I am working with older people... So, too much stuff at the same time is going to confuse them and it’s going to be trouble... So, I look at them also... Do they have the capacity to take this?</p> <p>“If ‘Yes, okay.’ How soon or how should I bring it in, how soon or how should I?’</p> <p>“If ‘No,’ then I don't even like... no they are going to... it can’t work, especially when it comes to technology-wise. I think of it now, it won’t work out.”</p>

Participant	Applied Sense-breaking Processes and Practices	Quotes
B6	Follows instruction of sense giver	Presentation (process not indicated)
B7	Follows instruction of sense giver	Presentation (process not indicated)
B8	Follows instruction of sense giver	Presentation (process not indicated)
B9	Follows instruction of sense giver	Presentation (process not indicated)
B10	Follows instruction of sense giver	Presentation (process not indicated)

<p>M1</p>	<p>Understand: Cognitive abilities Strengths and weaknesses</p> <p>Customise the message Facilitate, Filter unnecessary information Lead by example</p>	<p>“From a role perspective I think the first thing is that he must understand (the double) that he is in the business of unlocking people’s potential. So, that will require him to spend sufficient time to understand the strengths and the weaknesses of his team... make sure that the strengths complement each other and that he finds the appropriate mechanism or approach to get people to bring their best version to work... So, unlock potential.</p> <p>“The second is to... I suppose be the key facilitator of setting direction and that’s quite an active role... that’s not just a facilitator role... that’s being very active in the process of setting direction. So, that’s a function of understanding firstly, what the key shareholder expectations are of the business... so how is ‘success’ defined? Understand that, in the context of what the capabilities are, you require to achieve success. Understand how that relates to what happens in the industry, relative to your competitors. So, it does... the definition of ‘success’ and the capabilities you have give you a fair chance relative to what competitors have to offer to be successful.</p> <p>“Thirdly, once you have set that direction you understand the capabilities... you know how success will be measured... is to understand in the implementation of the respective plans that you make with your team. What hindrances or obstacles are there in the way of that and to be a very strong remover of hurdles or obstacles. And I suppose sometimes to be a ‘shield’ to protect the business from some of the ‘noise’ coming from the market or internally. And that ‘sometimes’ is a role that very few people understand and, as a CEO, I think you need to be... you know sometimes you are a ‘shield’; sometimes you are a ‘filter’ and sometimes they must feel the ‘burn’.</p> <p>A big part of your role is then further to... I suppose the first one of ‘unlocking potential’ is to create an environment where people will be successful and that speaks to really setting the correct example as a leader and understanding the role that you play in how culture develops in the business. So, I think I may have used one of my favourite Emerson quotes yesterday: “What you do is so ‘loud’ I cannot hear what you are saying.”</p>
<p>Participant</p>	<p>Applied Sense-breaking Processes and Practices</p>	<p>Quotes</p>

M2	Question-orientated learning	“Figuring out the ‘ How? ’ (rephrased question)... Well, sort of motivating the ‘ Why? ’, but sort of implementing the ‘How?’ I think is more where my level of management lies.”
M3	Ensure the correct message lands (feedback)	“You see in an operational role it’s a bit different... I would say than your actuarial role or your IT role or your human resources role on an EXCO level, because you go deep into not just the formalising, but the <u>landing of the strategy</u> and sometimes play a critical role in the execution of the strategy as well. ”
M4	Scenario analysis, followed by action	<p>“I think both. I think when it came to formulation, the finance view and the forecasting, etcetera on what our future view is of the company was very important. And when I say that is specifically because we had various scenarios floating around to formulate the strategy... so that: ‘Listen here, if we do X it will result in Y. If we do Y it will result in Z. If we take this route, this is what it will look like from a short- as well as longer-term perspective.’</p> <p>“And now that our strategy has been bedded down saying these are our strategic objectives or sort of milestones in the short- to medium-term, from the finance side it’s to track against that, to see ‘What now?’ and what the plans of the business are, to put those two together what does the future look like? And then that’s reported on an EXCO level every month based on what we see from the finance side, to be interrogated for the strategic decisions to be made, to see whether there are any ‘red flags’ and so forth.”</p>
Participant	Applied Sense-breaking Processes and Practices	Quotes

M5	<p>Plan-driven approach</p> <p>Team-focused delivery of message</p>	<p>“Our business problem is quite easy at the moment... meaning the outcomes we need to solve are fairly defined, which makes a strategy to get there easier. I suppose if we didn’t have the clarity of what we needed to achieve, then our strategy would have been difficult, or more difficult to come up with. So, my role in that is to support the plans that are being tabled and to assess whether or not the various plans that are being tabled will actually get us there.</p> <p>“The business is in a loss-making position. It’s pretty evident that we need to get it into a profit position, otherwise we will lose the support of our shareholder. So, it’s a sort of a ‘survival strategy.’ So, that’s not something that you formulate, it’s something that you know has to happen. So, if you are asking whether I know it has to happen, I know that. I am part of the team who agrees and admits that that’s the situation that we are in and the team is trying to translate that to the rest of the business to say: ‘What plans can we make to achieve this survival?’”</p>
M6	Non-instructional approach	<p>“I would say it’s probably 80 % implementation... once the message has been passed down, you need to make sure that you get the job done. That 20 % formulation would just come down to how I get my team to work and the manner to achieve that. For me, the best way to do it is just to convince them that: ‘Okay, you need to do this and this is how’ – obviously we are doing it... not just a case of: ‘Do this because I told you,’... because that for me almost never works. Yes, so it’s more around passing the message down and convincing my team that this is the right thing to do.”</p>
Participant	<p>Applied Sense-breaking Processes and Practices</p>	<p>Quotes</p>

M7	Story-telling approach to strategy translation	“So, I think the role that I am playing in our senior management level is to tell, to break it down into a story, so that everybody understands it in my team. ”
M8	Seek counsel before acting (feedback)	<p>“So, I think from an Exco level, obviously they have more insight as to what is happening in the country, in the world, in terms of insurance, the risks and the opportunities...</p> <p>I think from my level it is to look at what I do... So, more or less, saying: ‘We need to achieve this.’ These are my enablers, but what are the things that are going to prevent me from activating my enablers to help me to achieve my target?</p> <p>“So, for example, at the moment, the petrol price hike... you know... so I see it not necessarily as a bad thing. [really?] We can use it as a selling tool because if you save a client a R100 on his short-term insurance, that is going to cover his additional petrol costs.”</p>
M9	Constant monitoring and feedback	“So, my role is to look for opportunities within the market... both from a product and a distribution perspective. So, my role is to identify those opportunities... bring those opportunities to the table... To an extent, ensure that they are executed and delivered on and then monitoring progress and benefit out of those. So, in essence, it is to help the business grow.”
Participant	Applied Sense-breaking	Quotes

	Processes and Practices	
M10	Holistic but systematic approach to strategy delivery	<p>“So, Organisation 2 as a company comes up with a strategy for Organisation 2. That strategy then needs to filter down into the different environments like... within Organisation 2.</p> <p>“So, we look at what Organisation 2 strategy is and we then put something together that supports that particular strategy.</p> <p>“So, I would be part of the formulation of the Organisation 2 strategy that supports the Organisation 2 operation. What we are doing is ‘implementing’. So, we are coming up with measures and things to do around how do we ‘hit’ that strategy? So, although we are putting a strategy together, it is ultimately something that we want to do for our environment that feeds into that strategy.</p> <p>“But, in terms of formulation at an Organisation 2 Level, I would be involved in that from a formulation perspective.”</p>
M11	Linkages to overall strategy (feedback)	<p>“So, there’re different levels, so we have the leadership summit, well not ‘summit’, but leadership session where we get to play a part in the actual strategy. That’s once or twice a year... then there is with my direct head... we will sit and our group strategises and we will do our own strategy. And then in the smaller environment... my own department... I have to have my own strategy... how we link into it.”</p>

Participant	Applied Sense-breaking Processes and Practices	Quotes
M12	Linkages to overall strategy (feedback)	<p>“The role I play now is I am pretty much a ‘receiver of strategy and translator of it’... In terms of how we execute and what we execute. So, for me, it’s difficult to say how I would do it here, but... for me in previous experiences... I think coming back to really what is happening in the IT and your competitor... IT, innovative, competitor and regulatory environment. For me, that was one of the key understandings we had to have in terms of themes to understand where we are going to be limited and what we need to take into account.”</p>
M13	Strategy from an operational viewpoint	<p>“My role is to operationalise and evaluate the strategy and come up with enablers / initiatives to help us attain our objectives.”</p>

**APPENDIX M:
INDUCTIVE CODES INVESTIGATING
SENSE MAKING AND SENSE GIVING OF THE
STRATEGY PROCESS**

External analysis and strategy process followed	
Participant	Quotes
B1	<p>“And we discuss the operations side and say: ‘Okay, how is that going to influence the strategy?’ Different projects that I work on, I give them feedback but I ask them for feedback as well on... We are changing our codification system from normal codes to UNSCBC which is a wider description that you can find us more easily on the web. That, but I have got experience in that. I am the only one who has got experience, but I have got it slowly but surely – so it is a teaching session as well.”</p>
B2	<p>“It always, always, always, always starts with a feedback session on how we performed from my last – and I am going to say <i>strategic session</i> because we have only had one formal one. So, every time <i>before</i>... I mean <i>after</i>... introductions or whatever else... the first point of order it will take is a feedback on how we... what we have done... what we have accomplished for the last month... three-month period.</p> <p>“So, that would typically be things like... sales... How did we do according to budget?... How did we do on new products that we maybe wanted to introduce?... and ...Did we actually do it successfully?... Did that take us into any new customer sites that we wanted?... Any business lost would have also been reported in there... Yes, so that is number 1, we will do that... Every week.</p> <p>“Then everyone who forms part of this smaller strategic team would actually give us feedback on his / her perception of how he / she did to feed this... his / her portion that he / she is responsible for... So, when he / she comes for his quarterly meeting we regroup all of these answers to see where there are any commonalities... So, if only this one person complains the whole time about: ‘No, his / her opposition’s pricing is better’... or... ‘His / her opposition’s buying is better’... whatever else, we need to go and look at that... identify why he / she has this perception... also get that changed.”</p>

	External analysis and strategy process followed
Participant	Quotes
B3	<p>"I would say more under 'implementation.' 'Formulation' in the sense of 'new procedures.' If we identify a risk or somewhere in the company where we are lacking, then I would be brought in to formulate procedures... official procedures... step by step, for instance. And then, on the 'implementation' side, I would say I am mostly brought in whenever there is a problem... when interns get stuck or mistakes are made, before the big bosses find out."</p>
B4	<p>"I mean... I think it is pretty quick because I have got direct access to B2... If he is not in the office, I call him or I WhatsApp him or I email him. So, for example, various processes... because certain processes we have seen they do not work. So, I would sit then with HR and whoever is relevant in that case and we would develop processes to make sure that we have set processes that we follow to make it easier. So, then: 'Okay, so I should give you a scenario for me? Okay, so for example, I am in the internal service department... So, we have various sales reps. We have one in Cape Town, Mpumalanga and here in Gauteng, right? So, each one has assigned an internal sales presence. So, for me it will be Cape Town, and the others, Mpumalanga and Gauteng.'"</p>
B5	<p>...but I will say: "Yes, there are a lot of strategies that are needed throughout the process. Remember, Organisation 1 is still a new... not new company... but a small company, so there is a lot of stuff that they need to get in place, especially process and the process comes from the strategy."</p>

	External analysis and strategy process followed
Participant	Quotes
B6	<p>“Exactly... So, for you to implement something you have to know what the effect is on the chain from the top to the bottom. So, I think that helped in that way, because as much as I manage them, they can do it better than me [I can], because they have been doing it for years.... So, I was like: ‘This is simple... let me go to the packing team and ask them: “How can we better this?”’ So, we went to them and they came up with suggestions. I mean... that was the answer, ‘Thank you, guys.’ Because the guys on the <i>ground level</i> know how to work... So, it’s all good and well to say: ‘We want to be the leading...’ – but, at the heart of it, we are talking about gloves and the customer wants the gloves.... This is their perception of Organisation 1... this is their perception of the company and, to be the best, you must pack the best. And it all then goes back down to the implementers.”</p>
B7	N/A
B8	N/A
B9	N/A
B10	N/A

External analysis and strategy process followed	
Participant	Quotes
M1	<p>“But, providing direction means that you start the process, given your context and your accountability, spend a huge amount of time communicating strategy as far as you can in as personal and tangible and practical a way as you can to ensure that there is proper understanding... So, if those two things aren't sort of present in the process then I don't think that strategy is typically articulated well and it's very seldomly implemented appropriately.”</p>
M2	<p>“So, what is first delivered is our balanced score card.... So, this is the stuff that we need to achieve and why we need to achieve it.... And we are asked to be prepared in terms of enablers, initiatives, or things that we are going to do to make these things come alive, for them to actually happen.... So, when we get into the meeting, we have already done research and what is expected of us and we come and we strategise about how we are going to do it. So, I will say: 'I want to try this... this might aid this... it enables this.' But, then we are all together and like they say 'two is better than one,'... then it's sort of all the operational heads, we will sit together and say: 'Okay, sales need to hit X amount of sales... What plans do we have this year to ensure that that happens?' M1 and Exco will have a discussion around what needs to happen. My COO will come to us and say to us: 'This is what we think needs to happen, do you see it?'... 'How are we going to make this happen?'.... So, that's sort of consultative. We will then take it to our managers and say: 'Right, this is what we need to achieve... this is what we need achieve for 2021 to be a success... this year to be a success. I have come up with a couple of things, I don't know how they are going to work.' Or... 'This is what I think, but what do you think?' So, that becomes consultative. Then the managers have one with their team managers and that's a consultative approach.”</p>

External analysis and strategy process followed	
Participant	Quotes
M3	<p>“So, originally and I tried to test it a couple of the... how we go about it. So, first of all, it starts with the bigger Organisation 2 strategy and maybe less, but less emphasis on that, but you must sketch that picture. Because it’s like a puzzle, everything fits into – every area, every department, every business unit fits into that bigger Organisation 2 strategy. And, if there’s a disconnect, because we are not an island on our own, we operate in this bigger group – if there’s a disconnect, that people can’t see but how does what we are doing here connect to that bigger strategy of the group. So, we start with that first. Maybe I should start with who do we land it with.”</p>
M4	<p>“Okay, if there is a strategy session, I think the first thing is there are links to almost every part of the business. You need to – especially because I am in – it’s not because I think finance is the ‘end-all and be-all,’ but quite an important component to any strategy is your financial results and what it will translate to from a profitability perspective and money, etcetera. So, if we have a strategy internally in finance, we will have to take into account information from the sales world: ‘What are their plans? What’s our view for sales in the next few months? What initiatives are there and how they would play out?’ You need to understand the operational environment from a staff perspective, because there are expenses that will have to be paid, and so forth. You will have to take... ‘like to our distribution, what distribution costs there would be for us to make the sales that the sales team are envisaging.’ ‘What’s our system impact? Is there any system impact? What are the system costs relating to what our plans are? Do we have sufficient support functions in actuarial and IT, etcetera?... So, support that.’ So, really from a strategy discussion before we take anything for an Exco discussion, I will have to assess all of those links to form a full picture and then show to Exco level to say: ‘That is our... from a strategic perspective how it should play out.’”</p>

	External analysis and strategy process followed
Participant	Quotes
M5	<p>“As a business what we try to do is first we get the senior leadership of the business together... So, a bit wider than just the executive committee. So, you involve key senior management as well. We then share, present how we have constructed the context of where we are..., so both external and internal. In the current round it was heavily weighted towards internal focus because of where we are.</p> <p>“So, I suppose... if it was a different time, we would have looked externally a bit more. That sets the scene. What usually happens is then there is a proposal to say... – so M1 would propose that: ‘I think these are the things we need to focus on... What is the general take on the floor?...’ which we will then debate to some extent. But, it doesn’t happen on one day only, so this is a fluid process and it flows throughout our monthly sort of assessment of financial position, financial results and achievement... through to our quarterly prioritisation of project focus and then into an annual assessment of strategy. So, all of that information is gathered and, if we understand all of it in the same sort of context, we then come up with a strategy that we then just make nice and pretty so people can understand.”</p>
M6	<p>“So, I have regular discussions with my manager and there I discuss... so it can be something as simple as what work I am currently busy with and then we will discuss things that I think I should get involved in as well... So, future projects. And those discussions are usually centred on how it’s going to help one of the objectives. So, we can discuss regular day-to-day stuff and say: ‘I need to fix this and I need to fix that, but it’s not going to really help the objectives... let’s sort of put that aside and work on something that’s going to have a more direct or bigger impact on them.’ From there then I would sort of go to my team and say: ‘These are the tasks we have been given, who wants to work on which one?’... and: ‘How can we help each other achieve those projects which our team has been given?’ So, I think that also helps with ensuring that you don’t get given projects that are going to be meaningless.”</p>

External analysis and strategy process followed	
Participant	Quotes
M7	<p>“So, it would probably be:... ‘Yes, it would probably be our management team. Because alignment for me is always very important. It would probably be our... in our Human Capital team... they are the people that usually are involved with change management and those kind of things and it is very important that they... because there is always somebody that is involved with strategy when it comes from that side.’ So, those are the kind of people that will be involved in my mind. It is not necessarily your..., I do not know what is the right word... but the lower levels.”</p>
M8	<p>“So, it was from M1, from an Exco level to the leaders. So, all the middle-, senior-management. And then we had to take it down to our team managers and the advisors. And that is where we had the group session. So, the story-telling... where our department... so, the story-telling started at M1 level and how we fit into the strategy. You know you cannot make... uh... 100 people... 120 people part of the same story.”</p>
M9	<p>“I do think that you have to include... you have to include at least a representative of where the formulation occurred. Now that could... you could draw a line in between levels, but, if there is a strategy to execute on...uh... you know a new client process within the call centre.</p> <p>“In terms of executing I think it would be... it would add a lot of value to incorporate or include at least a manager of sorts from the environment from which it was made. Because, again I think the ability to execute on a strategy and the unique challenges that a function could face, again might be lost in translation as it goes up the chain. Or, including a stakeholder as close to the... as close to the process as possible, I think would give a lot of perspective as to why a strategy could fail. I think it is giving context because again as we said previously, a strategy... strategies, in many instances, are paper-based exercises. Being able to give context as to why X on paper does not equal X in real life, that is I think where a lot of value could sit.”</p>

	External analysis and strategy process followed
Participant	Quotes
M10	<p>“So, our environment, I will take you through what we actually did. So, given that we know what the Organisation 2 strategy is, that was shared with us, we had a day planned. And what we did, when we came together, was exactly: ‘Guys now that we know where Organisation 2 is going, how do we support that particular strategy?’ Typically, our process would be one of the Exco gets together... we have an intense discussion and we challenge them very robustly around where it is that we are going and where we are taking this business. And, similarly, once everybody understands what the Organisation 2 strategy is, is then to go into our different environments again to go and look at your environment and then have the discussion with your teams on how do we fit or how do we feed into what Organisation 2 and ultimately – or rather Organisation 2 and then ultimately what Organisation 2 wants to do.”</p>
M11	<p>“So, there's different levels... so we have the leadership summit... well not summit, but leadership session where we get to play a part in the actual strategy. That's once or twice a year. Then there is with my direct head... we will sit and our group strategises and we will do our own strategy. And then, in the smaller... my own department, I have to have my own strategy... how we link into it.”</p>
M12	<p>“This is a very holistic one. We, as our business area... Organisation 2, follow the same process, so it comes from Exco and Exco shares with the key managers of all areas within Organisation 2 their need for the year, or strategy for the next year and how it pans out then in terms of budgeting... and how it pans out in terms of our balance scorecard. So, that message is very clear. This year they embarked on a process of storytelling and, in our team, we had to come up with what is our role and how we see the team helping strategy being met and we actually created a video in our team.”</p>

External analysis and strategy process followed	
Participant	Quotes
M13	<p>“Share the vision of the end goal... invite all role players to a session where we discuss objectives and formulate enablers. The invite to the session will include pre-work with areas we are solving for as discussion points. All the role players in the value chain would need to be part of the strategy session. We would need to record the session with a scribe to take notes of enablers and also note the stakeholder’s interpretation of the strategy at play.”</p>

**APPENDIX N:
PRESENTATION CODES ORGANISATION 1**

Presentation Findings: Participants B7, B8, B9, B10

Key Findings (Themes)	Explanation of Themes	Sub-theme		
		1	2	3
Domino effect of incompetence	Incompetence in one might lead to incompetence in others	If sense checking does not take place, mistakes may occur	Feedback loop	
African “knapsack” analogy	Speak up or don't complain	Assumption that management knows problems exist	Communication matters	
Shared accountability can lead to shared sense	Member checking	Grow key strengths	Shared sense	
Mentorship	Guided work efforts	Support drives performance	Application-based teaching	
Free thinking	Creativity is encouraged	Modified understanding	Opinions are valued	
Leadership resistance	Finger pointing by leaders	Assumption of knowledge with no teaching	Humility inability	Money before people

Key Findings (Themes)	Explanation of Themes	Sub-theme		
		1	2	3
Fear factor	Exposure	Making mistakes	Growth	Authority
Empowerment	Real vs “bullshit” empowerment	Teaching is critical	Enrichment occurs	
Culture	Organisational	Origin	Seen and heard	Enables
Strategy is not cloud based	Practical/Action based	Actions lead to performance		
Open system	Structure	Open to communication and ideas	Hierarchy should not / does not become a hindrance	
Strategy is implication based	Unaddressed mistakes cost the company	Vigilance in strategy is important		
Time factor	Training for successful learning (improve translation)	Time frames	Strategy is time based	Work smarter not harder
Management of expectations	Clarify the work roles	Alignment of expectations and work		

Key Findings (Themes)	Explanation of Themes	Sub-theme		
		1	2	3
Appearance vs reality	Appear to learn and understand	Show up, but do no work		
Competence vs technology	Tech embarking seen as competence and vice versa	Actual value of technology		
Ignorance escape route	Blame – I did not know, therefore	Verify so that one knows		
Improve the “stickiness” of translated strategy	Through action	Show and tell	Doing it oneself	
Assumption vs verification	Not checking practicality of suggested strategies	Unwillingness to admit/ consider lack of strategic fit	Sense checking	
Suggestion vs action centredness	Ideas remain suggestion based	Lack of practical implementation	Application of knowledge	

**APPENDIX O:
SURVEY RESULTS ORGANISATION 2**

Participant Code	Did your leader explain and discuss the key messages with your team regarding the Organisation 2 strategy / scorecard?	I can see a clear link between what I do at work and the Organisation 2 strategic goals and objectives	In one sentence say how you will contribute in your world of work to reach our F2019 objective:	Can we #countYOUin to ensure that Organisation 2 reaches our F2019 objectives?	If you have any questions regarding the strategy or require additional information please comment below:
AT	Yes	Yes	Make more sales.	Yes	
	No	Yes	I will put in extra effort.	Yes	
	Yes	Yes	Reaching the target set for me.	Yes	
	Yes	Yes	Working extra hours to bring in more sales.	Yes	
AK	Yes	Yes	Performing at my highest output to achieve the set targets.	Yes	I understand the need and I am in
	Yes	Yes	I will be focused on the goals and aim to achieve.	Yes	
AD	Yes	Yes	Combine the parent company values to ensure that the systems work to advance the contact centre advisors and not serve as a hinderance.	Yes	
	Yes	Yes	Stable changes and system stability.	Yes	
BS	Yes	Yes	Work hard.	Yes	
	Yes	Yes	I must put through quality leads, so that the agents can close the leads. That way we can have clients that stay on the books.	Yes	
	Yes	Yes	Qualify as many quality leads as possible.	Yes	
	Yes	Yes	I will make sure that each client I talk to I give the best service.	Yes	
	Yes	Yes	Put as much time and effort into my work as possible, so that we can do this.	Yes	
	Yes	Yes	I will be focused on my monthly target and exceed it to support sales with more quality leads.	Yes	No questions, everything is clear

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BB	No	Yes	Validate claims to ensure we settle only valid claims.	Yes	
BS2	Yes	Yes	Continue reaching the target in the BEE requirements linked to service providers.	Yes	
BP	Yes	Yes	Each member of the team plays a key role to achieve the F2019 objectives and the strategy. By working together and supporting each other is making it easier for everyone.	Yes	
	Yes	Yes	Continually ensure that we keep ourselves busy with the thing that moves us closer to reaching our targets linked to our strategic objectives and look for ways in which we can do things better.	Yes	
	Yes	Yes	Focus on making sure that project delivery happens for the prioritised projects, create a healthy culture and make sure the systems are stable.	Yes	
	Yes	Yes	Manage direction towards breaking even in F2019.	Yes	
CC	Yes	Yes	Commit to work hard and assist clients fast and to the best of my ability.	Yes	
	Yes	Yes	Upselling more.	Yes	
	Yes	Yes	I will focus on my NPI specifically.	Yes	

Participant Code	Did your leader explain and discuss the key messages with your team regarding the Organisation 2 strategy / scorecard?	I can see a clear link between what I do at work and the Organisation 2 strategic goals and objectives	In one sentence say how you will contribute in your world of work to reach our F2019 objective:	Can we #countYOUin to ensure that Organisation 2 reaches our F2019 objectives?	If you have any questions regarding the strategy or require additional information please comment below:
CH	Yes	Yes	I will keep paying attention to detail to pay out valid claims.	Yes	The vision and objectives are clear
	Yes	Yes	Being productive and delivering excellence.	Yes	
	Yes	Yes	Improve client experience and interactions with Organisation 2 at claims stage.	Yes	
	Yes	Yes	Improve client experience and satisfaction outcomes.	Yes	
CC2	Yes	Yes	MA enables performance through successful completion of the risk-based audit plan and the identification of risks in the business.	Yes	
	Yes	Yes	I am an enabler and will, therefore, ensure that we manage risk in the business in such a manner that it enables the other departments to achieve the goals set for the F2019 objectives.	Yes	
CL	Yes	Yes	Sign up quality business and give awesome advice to clients and brokers.	Yes	
CF	Yes	Yes	I will enable business to achieve their objectives through project delivery.	Yes	
	Yes	Yes	I manage all Organisation 2 Compliance Projects. I will contribute to the F2019 objectives by ensuring that all risk and compliance projects are delivered within the agreed deadlines, thus ensuring compliance and achieving the excellence goal.	Yes	

Participant Code	Did your leader explain and discuss the key messages with your team regarding the Organisation 2 strategy / scorecard?	I can see a clear link between what I do at work and the Organisation 2 strategic goals and objectives	In one sentence say how you will contribute in your world of work to reach our F2019 objective:	Can we #countYOUin to ensure that Organisation 2 reaches our F2019 objectives?	If you have any questions regarding the strategy or require additional information please comment below:
DG	Yes	Yes	Dedication, loyalty and good planning... keeping all company values.	Yes	NO
	Yes	Yes	By working together and ensuring that we meet clients' expectations.	Yes	
	Yes	Yes	Assisting other departments.	Yes	
	Yes	Yes	Reaching all set targets to lessen the loss ratio. Do what needs to be done regardless of whether or not it is my work.	Yes	
	Yes	Yes	Push to salvage faster. Increasing the overall sale ratio on the SMD front.	Yes	
DP	Yes	Yes	To settle claims in a fair manner with the best possible service, and to assist with the growth of the company for 2021.	Yes	Nothing at this point
DR	Yes	Yes	To be profitable and minimise staff errors.	Yes	
EM	Yes	Yes	Make set targets.	Yes	
	Yes	Yes	I will achieve my goal set out to be profitable.	Yes	
	Yes	Yes	Make sure everyone takes ownership of what they need to do and is held accountable when they do not.	Yes	
	Yes	Yes	Make the most sales for our department every month.	Yes	

Participant Code	Did your leader explain and discuss the key messages with your team regarding the Organisation 2 strategy / scorecard?	I can see a clear link between what I do at work and the Organisation 2 strategic goals and objectives	In one sentence say how you will contribute in your world of work to reach our F2019 objective:	Can we #countYOUin to ensure that Organisation 2 reaches our F2019 objectives?	If you have any questions regarding the strategy or require additional information please comment below:
EdT	Yes	Yes	Execute plans to ensure the building of the Safety offering and increasing penetration.	Yes	Thanks for clearly articulating the strategy
	Yes	Yes	Dedicated support to the distribution community that creates sustainable value through identifying opportunities and assisting with execution thereof as well as protect experience when dealing with Organisation 2 . This will result in increasing planner support.	Yes	
	Yes	Yes	Assist the business in successfully implementing those initiatives required to position itself for growth in the future.	Yes	
	Yes	Yes	Making our sales targets in the IFA space and also increasing our supporting brokers and growing our footprint.	Yes	
FB	Yes	Yes	I understand the end goal and believe in this company.	Yes	
	Yes	Yes	Be more visible and have continual engagements regarding growth, conversion and profitability.	Yes	
	Yes	Yes	I must make my target each and every month.	Yes	
	Yes	Yes	Achieve target.	Yes	
	No	Yes	Get more sales.	Yes	
	Yes	Yes	By applying our team's strategy of GECE (Growth Engagement Conversion Efficiencies).	Yes	
	Yes	Yes	Achieve the specific target that was set for me.	Yes	

Participant Code	Did your leader explain and discuss the key messages with your team regarding the Organisation 2 strategy / scorecard?	I can see a clear link between what I do at work and the Organisation 2 strategic goals and objectives	In one sentence say how you will contribute in your world of work to reach our F2019 objective:	Can we #countYOUin to ensure that Organisation 2 reaches our F2019 objectives?	If you have any questions regarding the strategy or require additional information please comment below:
GJvV	Yes	Yes	Build, tell and sell. Build on marketing campaigns. Tell the story about our value proposition and brand. Sell/market the products we have to offer.	Yes	
JdIR	Yes	Yes	We fall under the Excellence column which looks at "Improve client experience and satisfaction outcomes". We will achieve this by continuing to settle valid claims, as fairly and accurately as possible and giving clients an unforgettable claims experience by delivering excellent service.	Yes	
	Yes	Yes	By ensuring that we live the claims purpose: to settle valid claims fairly, accurately and as quickly as possible.	Yes	
JG	Yes	Yes	Work as needed and go above and beyond.	Yes	
	Yes	Yes	Upsell awesome service mindful of service level.	Yes	
	Yes	Yes	Maximising on all the interactions to upsell.	Yes	
	No	Yes	Staying positive and working at my best.	Yes	
KP	Yes	No	I always do and give my best in everything I do but it becomes bad when you do not see the results of your hard work.	Yes	
	Yes	Yes	Push as hard as I can to ensure that my set targets are met.	Yes	
KP	Yes	Yes	Display a strong value of excellence.	Yes	
	Yes	Yes		Yes	

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KG	Yes	Yes	By keeping an eye on the loss ratio.	Yes	Content with the current process.
	Yes	Yes	Give the most awesome customer service so our brand stands strong.	Yes	
	Yes	Yes	To be innovative in my current role in finding new and effective ways to serve our clients and improve processes.	Yes	
	Yes	Yes	Profitability is one of our main objectives and coaching on upselling and hard closing will be a continual thing amongst our advisors so we can reach our target.	Yes	
	Yes	Yes	Make the goals clear and communicate daily.	Yes	
	Yes	Yes	Staying focused and constantly coming up with innovations and ideas to boost NPI.	Yes	
LP	Yes	Yes	Try to save more money to improve the cost-to-benefit ratio.	Yes	
	No	Yes	Focus on maintaining targets, and not merely reaching them, but exceeding them. In this way, we can reach our targets confidently.	Yes	

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LN	Yes	Yes	Reaching my monthly target.	Yes	We need to be reminded on a monthly basis so as to stay focused.
	Yes	Yes	Being a team player.	Yes	
	Yes	Yes	Giving awesome service and working hard.	Yes	
	Yes	Yes	Making sure that scripting is always read verbatim.	Yes	
	Yes	Yes	Enhance my skill to be able to give excellent service.	Yes	
	Yes	Yes	To all always do the right things and reach the agreed targets.	Yes	
	Yes	Yes	Upsell and focus on quality to avoid staff errors.	Yes	
	Yes	Yes	Always deliver the best service I can.	Yes	
	Yes	Yes	Ensuring day-to-day that my targets and objectives are met and my objectives are in line with those of our company.	Yes	
LM	Yes	Yes	Proactively driving engagement.	Yes	
	Yes	Yes	By cost saving, living the value of excellence through my work, forming part of a high-performance culture, taking part in talent management and development, supporting transformation and driving compliance.	Yes	
	Yes	Yes	Continue providing quality work at all times in everything I do, and that will ultimately make my team great if everyone also does their best.	Yes	
	Yes	Yes	It is my duty as Compliance Facilitator to make sure we meet all the standards as set out by the FSCA so that all our operational representatives reach regulatory compliance.	Yes	

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LvH	Yes	Yes	By effectively and efficiently improving the RRE side of our business.	Yes	
	Yes	Yes	By creating efficiencies in the claims area with the VAA project and also improving the loss ratio.	Yes	
	Yes	Yes	Use my skills and ability to ensure that I drive business solutions that are efficient, effective and cost conscious.	Yes	
	Yes	Yes	The 'Starfish' project will be my number one priority, thus adding to profitability. Furthermore, I want to assist the testers to test the actuarial models as they are new to them. Lastly, I will be doing my first renewal changes in RRE as part of the 'Starfish' project.	Yes	
	Yes	Yes	I am more focused on the pricing and underwriting space, developing models and scripting that makes actuarial work easier.	Yes	
	Yes	Yes	I will be focused, diligent and agile to ensure throughput of delivery and system stability.	Yes	
	Yes	Yes	Profitability.	Yes	
	Yes	Yes	By working harder.	Yes	
LB	Yes	Yes	To provide accurate and timely lead indicator tracking and forecasting that will enable pro-active management decisions to ensure we reach our objectives.	Yes	

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LG	Yes	Yes	Commitment to the cause.	Yes	
	Yes	Yes	Always be aware of the required standards, both personal and within the team.	Yes	
	Yes	Yes	Hitting daily target and, therefore, monthly target, writing quality business.	Yes	
	Yes	Yes	Make target.	Yes	
	Yes	Yes	By reaching and exceeding my targets.	Yes	
	Yes	Yes	Making sure that, as a team, we reach and outperform our targets month in, month out.	Yes	
MW	Yes	Yes	Bring in more money / banking by exceeding our targets.	Yes	
	Yes	Yes	Minimise loss ratio.	Yes	
	Yes	Yes	Coming up with a strategy to exceed all the targets set.	Yes	
	Yes	Yes	Positive contribution to the loss ratio.	Yes	
MK	Yes	Yes	I will continue to work towards exceeding the set target/s. I will also continue to motivate my team to ensure that they understand what is expected of them.	Yes	
	Yes	Yes	By making sure we strive to reach our Sales target and continue to live Organisation 2's values.	Yes	
	Yes	Yes	Make sure that every lead we receive is treated as "gold" and our clients receive awesome service from us.	Yes	

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NB	Yes	Yes	Do effective testing on projects with the urgency of reaching my deadline date.	Yes	
	Yes	Yes	Focus on fixing bugs to create better system stability to ensure that the same issue is not being fixed repetitively.	Yes	
	Yes	Yes	Quality of testing, seeing everything with a keen eye and finding ways of excellence.	Yes	
	Yes	Yes	I am part of the team that unpacks and resolves the compliance-related issues that we as a short-term company might face: POPIA, RDR, PPR, S5 compliance, 'Fit and Proper', Insurance Act. If I apply myself and focus on what is important, I can strive for excellence.	Yes	
	Yes	Yes	Testing smarter and more efficiently can help projects roll out faster and allow our operational sections to work more effectively. Projects/enhancements and getting rid of 'bugs' allow growth and enable further profitability.	Yes	
NB2	Yes	Yes	Provide reliable input and context on financial data that are provided to Exco and the broader finance community monthly.	Yes	
NA	Yes	Yes	By pricing and monitoring the pricing models to ensure growth and a good loss ratio.	Yes	

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NC	Yes	Yes	To ensure that we validate claims accurately and settle valid claims timeously. Providing excellent service.	Yes	
	Yes	Yes	By settling valid claims, accurately, as quickly as possible. Giving excellent service.	Yes	
	Yes	Yes	I must process claims fairly, accurately and as quickly as possible to enable Organisation 2 and its associated companies to have a positive cash flow by F2020/2021.	Yes	
	Yes	Yes	Settling valid claims, accurately and as quickly as possible. Giving excellent service.	Yes	
	Yes	Yes	By settling valid claims accurately and as quickly as possible. Giving excellent service.	Yes	
NTK	Yes	No	Always keep the client in the loop regarding what is happening. Working smarter and more efficiently.	Yes	
OM	Yes	Yes	Work harder.	Yes	You can just count me in
	Yes	Yes	Go the extra mile.	Yes	
	Yes	Yes	Do whatever it takes to achieve the goal at hand.	Yes	
	Yes	Yes	Do my best to meet my targets.	Yes	
OA	Yes	Yes	Ensure that our reserving is adequate.	Yes	
	Yes	Yes	Analytics is one of the enablers in the F2019 strategy, that means all projects I work on will impact our results.	Yes	

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OK	Yes	Yes	Continue doing my best and focusing on what needs to be done to reach our strategic objectives.	Yes	
	Yes	Yes	Continue hard work and commitment to my role.	Yes	
	Yes	Yes	Provide support to the Organisation 2 channel as well as drive activity and increase the number of supporting planners.	Yes	
	Yes	Yes	To ensure the complaints procedure is effective.	Yes	
PM	Yes	Yes	I will stay committed to the goal and I will also be consistent.	Yes	
	No	Yes	Make our department more customer centric rather than action driven.	Yes	
	Yes	Yes	Always meet my daily target.	Yes	
PB	Yes	Yes	Risk, Legal and Compliance are enablers in the achievement of our F2019 objectives. We ensure that the risks are identified and mitigated, processes run smoothly and controls are implemented and adhered to. All of these will enable other parts of the business to meet their strategic objectives better.	Yes	
RG	Yes	Yes	N/A	Yes	
	Yes	Yes	I will make sure that I achieve my goals and exceed targets, to ensure that Organisation 2 is profitable.	Yes	
	Yes	Yes	Dedication and positive attitude.	Yes	
	Yes	No	Do what's expected.	Yes	

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RE	Yes	Yes	Save.	Yes	
	Yes	Yes	Reaching my targets will also assist Organisation 2 to reach profitability.	Yes	
	Yes	Yes	Go the extra mile for your client and always give them excellent service.	Yes	
	Yes	Yes	Try to save as many policies as possible to reach our goal in 2019.	Yes	
	Yes	Yes	Staying positive and doing what is right all the time.	Yes	
	Yes	Yes	I will save everything I can without fail.	Yes	
RB	Yes	Yes	Ensuring that everything we do is aligned with the objectives and helps us achieve our Balanced Scorecard outcomes.	Yes	
	Yes	Yes	Continue looking at the risks we want to accept and making sure we take those within our risk appetite to make sure we have a profitable book.	Yes	No, the strategy is very clear and I understand my part in it.
	Yes	Yes	I need to manage the loss ratio while enabling growth to ensure that Organisation 2 reaches critical mass through sustainable growth.	Yes	

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SvdM	Yes	Yes	Focus on delivering projects on time and of a specific scope to support the business objective.	Yes	I am worried about our visibility - we need to go out there and brag about who we are!
	Yes	Yes	Most important is to have system stability. Ensuring system stability will contribute greatly to our scorecard.	Yes	
	Yes	Yes	Ensure all business requirements align with Organisation 2's strategic goals and objectives.	Yes	
	Yes	Yes	I support and assist the BSS team to achieve F2019's objectives easily.	Yes	
	Yes	Yes	I am part of the team that provides data to enable data analytics to convert the data into greater insight.	Yes	
	Yes	Yes	Involved in architecture for digital innovation and major involvement in online quoting capability.	Yes	
	Yes	Yes	Ensuring that the correct focus is created on projects and that key project items are delivered on time at an appropriate cost.	Yes	
	Yes	Yes	Working in the digital enabler space we directly impact this enabler as well as our growth focus area of delivering the Online quoting capability. I am also responsible for improving efficiencies within the self-service functionality and supporting these initiatives in the production environment for mobile and client and broker web.	Yes	
	Yes	Yes	Ensure focused support to the teams responsible for delivering the projects that support the F2019 objectives. Enabling teams to focus on the same.	Yes	
	Yes	Yes	Continue to focus on delivering incremental improvements and "big bang" initiatives, while keeping a tight leash on costs. Continue to engage with 3i to optimise the commercial engagement.	Yes	

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SG-H	Yes	Yes	By contributing 20 % to the loss ratio.	Yes	
	Yes	Yes	We can assist with the main outcome of the story by helping the company reach their target of being cash-flow positive by F2019.	Yes	
	Yes	Yes	Bringing down the loss ratio.	Yes	
SG	Yes	No	Increase sales and decrease staff errors.	Yes	I wish to understand why service level is such an important objective and how it contributes to/ impacts our business. If the target is not met what effect would it have on the scorecard of Organisation 2 ? I know what needs to be done, ready & determined to help the firm achieve success.
	Yes	Yes	I will ensure that we reach our target of incepted premium so that the business can reach its profitability objective.	Yes	
	Yes	Yes	I will improve processes, and the way of work in Broker Sales... this means better service levels, and an increase in quote-to-sale and premium written.	Yes	

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SM	Yes	Yes	Settle valid claims and reject fraudulent claims and identify upselling opportunities.	Yes	I need to mention that I was on leave when the F2019 strategy was set out for all leaders. However, the way my manager broke it down and simplified the message into a story made me understand our goals clearly.
	Yes	Yes	Reject. Reject. Reject. Saves much with loss adjusting.	Yes	
	Yes	Yes	Implementing the key points to the best of my ability.	Yes	
	Yes	Yes	Each individual needs to push 100 % and, when we reach that 100 %, push just a little bit more.	Yes	
	Yes	Yes	I will contribute by holding myself and my staff accountable for all targets set and understand that sometimes it is not the end of the world to lose staff to another area or out of the business. If they are happy and fit the culture; they will produce results.	Yes	
	Yes	Yes	Do my work as professionally as possible and make the right decisions.	Yes	

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SM2	Yes	Yes	I will put more effort into my work, participate more in team work to achieve better, take accountability of what I do and always be positive.	Yes	
	No	Yes	Give clients awesome service which will aid in their claims experience which will keep them as Organisation 2 clients which will make us profitable by F2019.	Yes	
TW	Yes	Yes	Contributing to the online fulfilment project.	Yes	
	Yes	Yes	Make sure the code I develop meets standards which will allow the system to function as expected and enable the end-user to use it effectively.	Yes	
	Yes	Yes	Through powerful data insights and analytics, I help empower the business to make good financial and marketing decisions and also free actuaries to do less nitty-gritty coding, making them able to focus more on rating and profitability.	Yes	

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TJ Employee Resigned	Yes	Yes	Consistency in following procedure and being accountable at all times.	Yes	
	No	No	To do my best not to create any staff errors where there is money that needs to be paid out.	Yes	If I require additional information, I believe I will communicate with my line manager.
	Yes	Yes	Making sure all relevant targets are reached.	Yes	
	No	Yes	Hard work, determination, commitment and to provide awesome service to our clients.	Yes	To create more development opportunities so that employees would be able to reach their full potential within
	No	Yes	Be positive, productive, on time and respect my work and pay valid claims. I love Organisation 2 : it is the best company to work for.	Yes	Organisation 2

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TvH	Yes	Yes	Increase profit and growth by improving risk selection through more advanced modelling techniques and data analysis.	Yes	
	Yes	Yes	By enhancing the pricing, I will assist to drive profitability and, working on the Safety CVP, we will aim to drive growth. Monitoring the safety rewards will also assist to manage the profitability.	Yes	
	Yes	Yes	I will contribute to the profitability and growth objectives by working to reduce the loss ratio and improve conversion ratios on new business.	Yes	
	Yes	Yes	As an actuarial pricing specialist, I will attempt to contribute a rating structure that can engineer the F2019 written premium and loss ratio targets, while meeting our client-centric ideals.	Yes	
	Yes	Yes	I will develop my technical and general skills not only to price better to achieve the loss ratio goal, but also interact well with other teams in the company.	Yes	

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TP	Yes	Yes	Being an enabler for the business to do reporting internally and externally and also make strategic decisions by providing relevant data analytics of historic and forecast data. Furthermore, enhance profitability by identifying possible issues or errors, either through correcting incorrect data or limiting exposure to fines, etcetera, if incorrect data are applied. By living the values and being inclusive and supportive of colleagues, we can help Organisation 2 obtain and live the desired culture.	Yes	I am comfortable and understand what I need to attain to contribute to our success.
	Yes	Yes	We will be managing the two companies financially as one, with an emphasis on management expense forecasts and budgets, with the goal of achieving a positive cashflow for the two companies in F2021.	Yes	
	Yes	Yes	I will provide reports on the performance as well as analysis thereof, enabling my manager to drive changes to achieve our strategic objectives.	Yes	
TG	Yes	Yes	Ensuring work and advice provided will help the business minimise unnecessary losses.	Yes	

Participant Code	Did your leader explain and discuss the key messages with your team regarding the Organisation 2 strategy / scorecard?	I can see a clear link between what I do at work and the Organisation 2 strategic goals and objectives	In one sentence say how you will contribute in your world of work to reach our F2019 objective:	Can we #countYOUin to ensure that Organisation 2 reaches our F2019 objectives?	If you have any questions regarding the strategy or require additional information please comment below:
TP2	Yes	Yes	I will create an action plan which will enable me to reach my targets and set a lesser TAT to finalise my claim which will not affect the quality of my work.	Yes	I'm excited about it. Gives me goose bumps thinking about it.
	Yes	Yes	By doing what's needed to be done. Paying extra attention to detail when processing claims.	Yes	Been with the company for over 10 years now and seeing how it has evolved is incredibly awesome.
	Yes	Yes	Being efficient, working smart and pro-actively to achieve our goals.	Yes	
	No	Yes	By paying valid claims.	Yes	
TM	Yes	Yes	By sticking to Organisation 2 targets and doing everything in my power to reach them.	Yes	
	No	Yes	Work hard every day.	Yes	
	Yes	Yes	Make target with quality sales on a daily, weekly and monthly basis.	Yes	

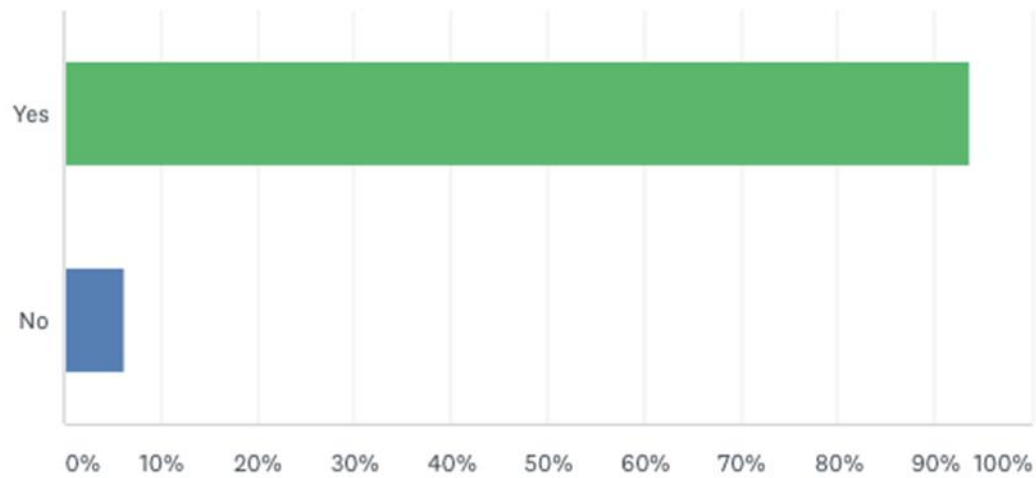
Participant Code	Did your leader explain and discuss the key messages with your team regarding the Organisation 2 strategy / scorecard?	I can see a clear link between what I do at work and the Organisation 2 strategic goals and objectives	In one sentence say how you will contribute in your world of work to reach our F2019 objective:	Can we #countYOUin to ensure that Organisation 2 reaches our F2019 objectives?	If you have any questions regarding the strategy or require additional information please comment below:
VS	Yes	Yes	To make sure that my managers' calendars are always organised and that I keep to my deadlines.	Yes	Nope. BP clearly highlighted the same again in his presentation during our prioritisation session last week!
	Yes	Yes	Be critical about what and how fast we do it. Deliver on the results we committed to as a business, assisting other business units as opposed to operating in a "silo" effect. Driving culture and being the "light switch" to our people (on/off).	Yes	
	Yes	Yes	Drive performance and employee engagement. Ensure we are efficient in our delivery of sales and service.	Yes	
	Yes	Yes	Continually look for solutions to the challenges we experience and ensure that my departments deliver great customer service and use all opportunities available to upsell, retain and pay valid claims.	Yes	
WS	Yes	Yes	Make sure the bottom line is not affected.	Yes	
	Yes	Yes	By improving and maintaining a crisp focus on my career and personal strategies aligned with our targets.	Yes	
	Yes	Yes	Pay and settle claims faster which equates to more happy clients which leaves us with more time for the investigative issues.	Yes	
	Yes	Yes	I will do my work to the best of my ability and treat customers with the necessary respect and integrity.	Yes	
	No	No	Meet the KPAs as required and exceed them where possible.	Yes	

Participant Code	Did your leader explain and discuss the key messages with your team regarding the Organisation 2 strategy / scorecard?	I can see a clear link between what I do at work and the Organisation 2 strategic goals and objectives	In one sentence say how you will contribute in your world of work to reach our F2019 objective:	Can we #countYOUin to ensure that Organisation 2 reaches our F2019 objectives?	If you have any questions regarding the strategy or require additional information please comment below:
WvdW	Yes	Yes	By not making emotional decisions when it comes to underwriting and focusing on what is best for the company whilst also having the best interests of the client in mind.	Yes	
	Yes	Yes	Prevent claims by checking risks before allowing acceptance.	Yes	
ZR	Yes	Yes	Making sales that contribute to profitability.	Yes	
	Yes	Yes	I will apply my experience and skill to ensure that I deliver exceptional service to potential clients. This will lead to clients talking about the Organisation 2 brand to friends, colleagues, etc., therefore, creating referrals.	Yes	
	Yes	Yes	Continue being consistent.	Yes	

**APPENDIX P:
SURVEY RESULTS (GRAPHICAL) ORGANISATION 2**

Did your leader discuss the key messages with our team regarding the Organisation 2 strategy / scorecard?

Answered: 209 Skipped: 12



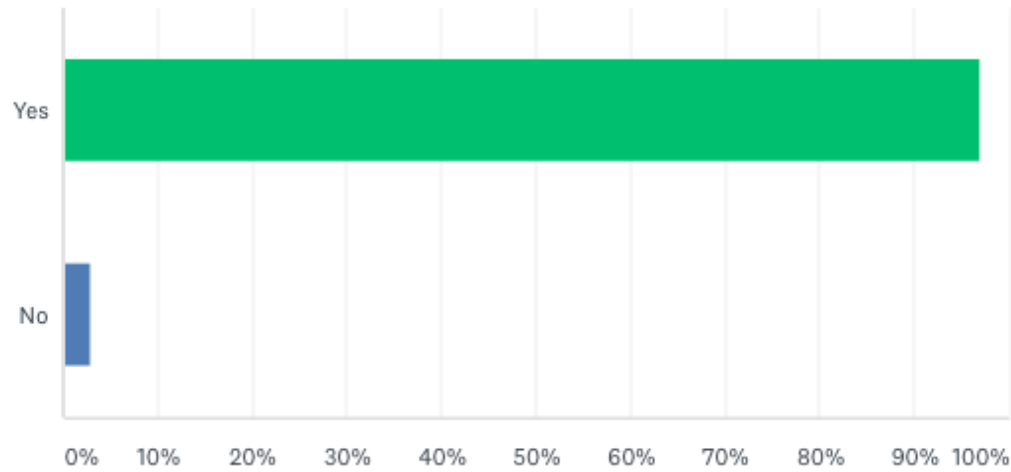
Participant:

- AT
- FB
- JG – resigned
- LP
- PM
- SM
- TR – resigned
- TP
- TM
- WS

ANSWER CHOICES	RESPONSES	
▼ Yes	93.78%	196
▼ No	6.22%	13
TOTAL		209

I can see a clear link between the work I do and Organisation 2's strategic goals and objectives.

Answered: 209 Skipped: 12



Participant:

JG – resigned

Nt

RG

SG

TR – resigned

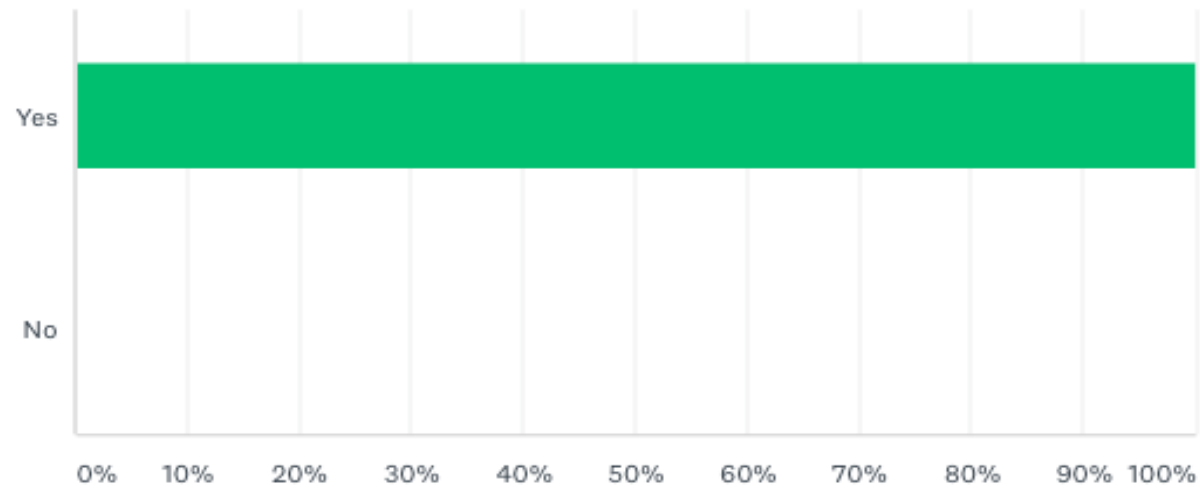
WS

ANSWER CHOICES	RESPONSES
Yes	97.13% 203
No	2.87% 6
TOTAL	209

Please tell us in one sentence how you will contribute in your world of work to reach our F2019 objective:

make sure projects make also clients delivering targets
team ensure enable will sales work loss ratio
focus improving reach best business achieve

Can we #countYOUin to ensure that Organisation 2 reaches its F2019 objectives?



ANSWER CHOICES	RESPONSES
▼ Yes	100.00% 207
▼ No	0.00% 0
TOTAL	207

**APPENDIX Q:
LIST OF PARTICIPANTS FROM ORGANISATIONS 1
AND 2**

Organisation 1 Participant Code	Title
B1	Chief Executive Officer
B2	Managing Director
B3	Supply Chain Coordinator (systems)
B4	Intern Supervisor
B5	Supply Chain Coordinator (operations)
B6	Intern (internal procurement)
B7	Intern (management)
B8	Intern (management)
B9	Intern (management)
B10	Intern (management)

Organisation 2 Participant Code	Title
M1	Chief Executive Officer
M2	Head of Sales
M3	Chief Operations Officer
M4	Head of Finance
M5	Chief Actuary
M6	Pricing Actuary
M7	Head of Underwriting
M8	Sales Manager
M9	Head of Business Development
M10	Head of Human Capital
M11	Claims Operations Manager
M12	Portfolio Manager
M13	Sales Manager

Organisation 1 Participant	Probes Years of experience in Strategy
B1	20 years
B2	12 years
B3	2 years
B4	1 year 8 months
B5	1 year 8 months
B6	None
B7	None
B8	None
B9	None
B10	None

Organisation 1 Participant	Probes Years of experience in Strategy
M1	11 years
M2	5 years
M3	10 years
M4	14 years
M5	6 years
M6	10 years
M7	10 years
M8	2 years
M9	3 years
M10	13 years
M11	3 years
M12	10 years
M13	5 years

I WALKED A LABYRINTH!

I walked a labyrinth!

It is said "In a maze you lose yourself but, in a labyrinth, you can only find yourself."

"Ask a question..." said the healer, "...walk in quiet grace and you may find an answer at the centre... or you may not but it is a walk worth taking". Under a cresting sun, a friend and I took the path leading up to the labyrinth, together we journeyed but at the entrance we each embraced the solitude. Some paths are meant to be walked alone.

"How can I best use what I have been given to serve? How do I use and share knowledge to empower, inspire and aid? Do I dare proclaim power, influence and strength? If so, how do I use them to lead?" How do I project this voice for the greater good?"

"A multi-layered question..." said I to my friend when she asked as we headed back down to the valley. With a knowing smile and a nod, she softly responded... "I expected nothing less..."

I walked a labyrinth! As I walked, like a mirage, the vision of me blurred.

The question became a silently uttered plea... to the creator... to those who came before me and those who would undoubtedly come after me. May I be deemed worthy; may mediocrity never taint my lineage. May creation that stems from me embody wisdom, humility and grace.

Seeds planted by those whose prophecies and beliefs give shelter, form and roots to my presence. The walk reflected the sacrifices made by my predecessors. Sacrifices made for me to, not only, exist but to walk this path of self-actualisation informed by critical realisation.

The plea continued... May I deserve to be called upon. May the blood that runs through my veins one day water the earth with sons and daughters laudable of the greats departed.

Should fire fall from the sky may the path it burns be visionary and inspired... if rain follows may it wash away fear and doubt and may those I join with to create be a force of almost unbearable power... stronger together yet solid apart.

You see ancestry explained had always deluded me... but on that day... as I walked, I discovered not who I was but who I was foretold to be... who I was destined to be... and who I intend to be!

I walked a labyrinth... I went in hopeful and came out vulnerable. I walked a labyrinth and found not myself but the beginning of my purpose.

Rebaona Letsholo