**Gordon Institute
of Business Science**
University of Pretoria

**The impact of nudging as a behavioural mechanism
in strategy implementation**

20820552

A research project submitted to the Gordon Institute of Business Science, University of Pretoria, in partial fulfilment of the requirements for the degree of Master of Philosophy with specialisation in International Business.

13 December 2021

ABSTRACT

Strategy implementation (SI) is a noteworthy struggle for managers and organisations owing mainly to the difficulties experienced by professionals when putting strategy into action; and attaining the envisioned outcomes. To heighten this challenge, there is no integrated research field on SI which makes academic contributions arduous. This does not even consider the uncertain environment created by the COVID pandemic. The primary line of inquiry for this research paper was around the impact of nudging as a behavioural mechanism for SI, although this was explored through a more general inquiry into 'organisational conditions', 'managerial agency as a component of SI' and 'materiality pertaining to SI'. This is important for various reasons, one of which includes the need to steadily connect traditional concepts in business and innovation.

The researcher followed a qualitative approach to explore the research topic. The sample consisted of middle-level managers and higher from multinational enterprises (MNEs) who had direct experience of SI tools and practises. The data was collected by using semi-structured interviews and in turn analysed by means of frequency and thematic analysis.

Interestingly, the impact of nudging as a behavioural mechanism for SI did not feature dominantly but the reasons for this are clear and linked to future research opportunities. The findings explored through the three themes above do support existing research for the most part. There was a tentative claim made around a possible contribution in regards to innovation which is believed to have altered in the past period – now a reactive approach versus a conscious choice. Future research opportunities include comparisons between small and big business environments, comparisons between developing and developed environments, resilience ratings linked to geographical location, awareness level of using behavioural mechanisms, and business life cycle considerations.

KEY WORDS

Managerial agency, materiality, nudge, organisational conditions, strategy implementation.

DECLARATION

I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Philosophy with specialisation in International Business at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

20820552

13 December 2021

CONTENTS

LIST OF FIGURES

LIST OF TABLES

GLOSSARY OF TERMS

Academic Term	Literature Definition
Behavioural Economics	The attempt of bettering one's grasp of an economy by means of using psychologically pragmatic models (Barberis, 2018). Giving credit to individuals with a balanced measure of rationality and minor human weakness (Thaler, 2017). Behavioural economics utilises different forms of conventional economic presumption (generally psychologically steered) to clarify and foresee behaviour; and to inform policy (Laibson & List, 2015).
Biases	Cognitive biases remain a central underlying reason for poor decisions. The main bias forms include heuristics, stereotype, subconscious bias, halo effect, social bias and framing effect (Wattanacharoensil & La-ornual, 2019). It is thought that numerous cognitive biases hamper individuals from rational logic (Madaan & Singh, 2019). Various aspects such as defective attitudes or behavioural inclinations inhibit cognition and ultimately the capacity to make ethical decisions (Watts, Medeiros, McIntosh & Mulhearn, 2020).
Choice Architecture	Choice architecture positions people as rational participants (Deterding, 2019). Furthermore, it can strongly influence choices and better welfare. The decision-making environment explains how an alteration to the choice structure affects behaviours. This is done without substantially changing economic incentives or what customers are aware of around the various options (Mrkva, Posner, Reeck & Johnson, 2021). Regarded as a tool used to alter the decisions which customers action, by changing the manner in which choices are offered (Panzone, Ulph, Hilton, Gortemaker & Tajudeen, 2021).
Corporate Strategy	Corporate strategy is the justification for the existence of a firm, the relevant firm scope, and defines the means by which diverse entities are arranged and presided over; simultaneously, particular topics such as divestitures and vertical integration are common (Menz et al, 2021). It is perceived as the manner in which an entity establishes value through the coordination and structure of various business pursuits (Hernandez & Menon, 2021). A probe into the research field is focused on clarifying what empowers firms to experience continual performance advantages in relation to the competition (Feldman, 2020).

Heuristics	Heuristics is used when academics theorise. This is used in conjunction with the 'rule of thumb' to develop insights and unravel problems innovatively (Furnari, Crilly & Misangyi, 2020). These models linked to decision-making surface when information, time and process prospects are finite (Guercini & Milanesi, 2020). Within strategic management, heuristics are perceived by numerous academics as discredited in comparison to meticulous analytical models or conventional methods (Bettis, 2017).
Managerial Agency	The action of bringing resources into effect based on previous practices. This also includes the ability to deal with current demands and to envisage multiple probable futures (Schwabenland & Hirst, 2018). From an agency relationship point of view, the principal entrusts a duty to the agent who completes the duty (Reim, Sjödin & Parida, 2018). There is a suggestion that managerial agency takes place when individuals determine which strategies to incorporate and at the same time when they are used (Alvarez & Porac, 2020).
Materiality	This concept of materiality has mostly been overlooked or left in the backdrop when it comes to strategy as practice (Bell & Vachani, 2020). Materiality involves matter, tangible materials and technologies linked to their self-directed qualities; and synergy (Gibson, 2016). Materiality impacts the info streaming from businesses to outside stakeholders (capital markets or other partners), forms the adoption of decision pursuit by managers and curtails the risk of excessive info (Mio, Fasan & Costantini, 2019).
Nudge	Previous research proposes that the nudge action or the intentional formation of choice structure created through psychological theories could modify someone's behaviour with a level of predictability (Tan, Lv, Liu & Gursoy, 2018). They are slight alterations to decision setting to prompt environment-friendly behaviours devoid of changing monetary motivation. There are numerous nudges that have been described within research along with those that influence sole aspirations to preserve a pleasing self-image and those that take advantage of individuals who are prone to emulating others (Chabė-Ferret, Le Coent, Reynaud, Subervie & Lepercq, 2019). There are two chief forms – those that are educational, for example reminders, and those that are non-educational, for example cafeteria layout (Hertwig & Ryall, 2019).
Nudge Unit	Generally, refers to units of behavioural science specialists who are entrusted with crafting behavioural interventions that influence behaviour without impeding choice. These interventions are swift and economical;

	and the most effective are then rolled out (Benartzi et al., 2017). The expeditious increase in behavioural interventions by using nudge units to extend a special moment to compare interventions of various size or scale (Dellavigna, Berkeley, Linos & Berkeley 2021).
S-as-P (strategy-as-practice) / Strategy as Practice (SAP)	The S-as-P concept accentuates the value of daily practices of individuals approving strategy. The focus is predominantly on the micro level (Marabelli & Galliers, 2017). The perspective highlights agency linked to humankind and conceives that strategy is a particular form of work (Friesl, Stensaker & Colman, 2020). This field has developed out of dissatisfaction with traditional strategy research (Höglund, Caicedo & Mårtensson, 2018).
Strategy Implementation (SI) / Strategy Execution	The continued interaction of the following three interdependent activities, namely: enacting, conceiving ideas and coordinating. These allow an entity to understand strategy through mutual reaction by stakeholders (Weiser, Jarzabkowski & Laamanen, 2020). Thriving SI is reliant on the daily actions as executed by individuals across levels (Olson, Slater, Hult & Olson, 2018). SI fundamentally owes to the fact that in reality, strategy falters at implementation stage as opposed to formulation stage (Lindsay, Jack & Ambrosini, 2018).

CHAPTER 1: PROBLEM DEFINTION AND PURPOSE

1.1 Background to research problem

Strategy implementation (SI) is a noteworthy area of interest, with multiple challenges around strategy materialisation and the attainment of predetermined outcomes. There is extensive evidence that failure of strategy is more common during the implementation phase when compared to that of the strategy formulation stage (Friesl et al., 2020). The implementation facet of strategy has drawn a smaller amount of academic interest in comparison to strategic planning in spite of its pivotal role in the attainment of performance results (Aladag, Köseoglu, King & Mehraliyev, 2020). Too often, academics assume that a robust strategy will translate into action, yet those on the ground report significant struggles in transferring their strategy into more. There is multiple impetus for these struggles with none more imperative than the implementation itself (Verweire, 2019).

SI drives struggle for the following reasons – heavy reliance on financials within strategy debates, focus on functional strategies, fragmented SI, absence of strategy into action (commitment) and leadership capabilities. On the contrary, the following fundamental basics support compelling SI – the nature of the strategy, alignment through SI and commitment through SI. This type of rationale can ultimately aid enterprises to advance their results, especially in today's tempestuous present. With so many aspects to contemplate, it is telling why SI is a formidable focus for the modern manager (Verweire, 2019). With the aim of continued competitiveness within the obstruse and uncertain times, there exists a need to spot and foresee the unfamiliar, also referred to as 'black swans'. It is when these are disregarded that competitive strife ensues (Van Rijmenam, Erekhinskaya, Schweitzer & Williams, 2019).

Returning to some form of normality post the COVID-19 pandemic jolt entails more than just returning to a former reality. This is because social systems are not likely to restore to a previous state without alterations and, as a result of the jolt, have the troublesome attributes of what is termed a 'black swan'. The inability to return to a former normality should be seen as more of an opportunity than a restriction as some of these former 'normal' aspects were the very source of calamity. Key to moving on is the fostering of wide-ranging resilience including aspects of strategy and innovation (Grandori, 2020). Annarelli and Nonino (2016) explained resilience as the capability to endure and counter internal or external impact and recover post occurrence. The most prevalent approach to resilience to date has been acting in response or defence to a specific situation. Hence

the management challenge is without a doubt to shift focus to a proactive strategy supported through activities promoting efficient processes and operations. Ghaurie, Strange and Cooke (2021) indicated that the novel realities such as COVID-19 has in some instances fast-tracked the adoption of the latest technological trends such as big data. Companies are more focussed on engaging clients through using digital channels and it is vital to understand that these trends are long lasting.

Strategy does not involve a single choice but is rather focussed on multiple choices. It should then come as no surprise that entities are seldom prosperous with the focus on a single large stake. Success is attained through an array of give-and-take linked to customer intent, resources, merchandise and scope – all of which bolster one another to generate value (Sull, Turconi, Sull & Yoder, 2018). The appearance of COVID-19 has had a vast impact on the prosperities of numerous global companies. The focus has shifted on how companies can rejuvenate throughout and post the pandemic which has been characterised by countless bankruptcies across all economies. There is a pressing need for strategic renewal in an attempt to advance organisational continuity and resilience (Amankwah-Amoah, Khan & Osabutey, 2021). According to the CEO Benchmarking Report 2021 (also known as The Predictive Index) which discloses the leading concerns and precedence of 160 CEOs post COVID, 96% of CEOs altered their strategy path post COVID with 50% implying a major shift. Another intriguing finding was that 53% (up 14% from 2020) of CEOs pointed to 'strategy development' as their top priority followed by 20% pointing to 'operational execution' as theirs.

There is a developing trend that strategy is becoming less clear-cut to individuals as time has gone by, owing mainly to the warp speed at which decisions have had to be made to adjust accordingly. Linked to this and more fitting to this paper, CEOs are of the opinion that employees are becoming less able to convey the strategy; that is to say, obfuscation around strategy within middle management will only deepen (CEO Benchmarking Report, 2021). Radaelli and Sitton-Kent (2016) further found that middle managers are restricted through a scarcity of rank influence or professional knowledge yet enabled through their deeply ingrained and transitional position. In other words, they are able to access any level within the organisation, but this requires step-by-step planning and an element of strategic caution. Middle managers are understood to be more influential across levels when they have significant resources – a good understanding of the structural discourse and social cohesiveness.

1.2 Definition of research problem and research aims

Existing research on SI is of concern as it is detached and this factor ultimately makes research contributions challenging within the knowledge field (Aladag et al., 2020; Friesl et al., 2020; Weiser et al., 2020; Leiblein & Reuer, 2020; Durand, Grant & Madsen, 2017). To counter this specific concern, there is a deliberate move to initiate a closer look at what is termed 'strategy as practice' (SAP) which has developed as a specific path to studying areas such as strategy work or strategic management. SAP is considered as a progressive option to standard strategy research with a deliberate move towards a more all-inclusive and diligent inquiry into what occurs throughout designing, devising and implementing of strategy. This also includes related activities concerning the reasoning and carrying out of strategy (Golsorkhi et al., 2015). Marabelli and Galliers (2017) further explained that SAP builds on the concept that suggests strategy is continual and emergent. It accentuates the significance of the daily practices of those who bring strategy into effect, therefore the focus is predominantly on micro-level activities linked to the strategic context (Höglund et al., 2018).

The latter conceptual framework enables the detached SI research to be integrated into specific implementation practices such as "structure and process matching, resource matching, monitoring, framing, and negotiating" (Friesl et al., 2020, p.1). A review of these practices indicates gaps surrounding how situated activities are laid down. Some of the predominant academic enquiries include the state and features of managerial agency within SI in addition to the materiality of tools that ultimately form the basis for all interaction. It is within these that the opportunity for future research lies with prominence on what managers and others do (Friesl et al., 2020). Ambos, Kunisch, Leicht-Deobald and Steinberg (2019) explained that headquarter control selections remain an important worry around MNC exploration.

Agency theory has the general ability to impart knowledge around suitable control selections, yet this view has not been fully exploited within the global context based on some limiting assumptions. Around tools, Jarzabkowski and Kaplin (2015) highlighted that their use is dependant not merely on the material qualities or the predetermined design but likewise the actors' understanding linked to context, which at times may result in innovative use. This highlights the importance of understanding the tool as a separate entity to its use.

A specific interest of the researcher lies within the 'monitoring' of advancement and performance which is key for strategic intent implementation. Monitoring undoubtedly

encompasses control but more importantly is associated with learning – altering an exact strategic intent once implementation has occurred. Existing research on monitoring, specifically points to tools that are utilised in such actions, for instance those used to monitor internally which include combining financial and behavioural elements of implementation (Friesl et al., 2020). Micheli and Mura (2017) elaborated that entities incorporate performance indicators true to their strategies. It has further been acknowledged that entities engaged with a differentiation strategy use non-financial and financial indicators equally. In comparison, those entities engaged with a cost-leadership strategy use predominantly financial indicators. Schubert, Baier and Rammer (2018) supported this view by highlighting the future need to more steadily combine behavioural and more traditional notions in international business as well as innovation research.

As alluded to, monitoring – which includes behavioural elements of implementation – is of specific personal interest. Thaler's and Sunstein's (2009) book proposed that there are numerous instances to 'nudge' individual's behaviour through understated changes to the milieu in which decisions are forged. Nudges are believed to be able to clear up all types of problems thought of as important across businesses and governments. Adaptation to this type of thinking could effect favourable robust change for the better, yet it entails acknowledging the abundance of anomalies around human behaviour. This of course forms part of the bigger study of behavioural economics (Gino, 2017). The 'behavioural economics' branch of knowledge depicts and studies economic decision making. In short, the related theories point to human behaviour being far less rational and steady in comparison to what traditional standard theory proposes. This is as a result of bounded rationality, restricted self-restraint and social predilection (Behavioural Economics Guide, 2020). An interesting future exploration, according to Löfgren and Nordblom (2020), should be how behavioural interventions such as a nudge are impacted by additional policy instruments.

1.3 Research problem

Taking the preceding sections into consideration and with the research aims in mind, the primary inquiry was around the impact of nudging as a behavioural mechanism in SI. This was supported through further inquiry into organisational conditions, managerial agency as an element of SI, and materiality relating to SI. The research questions (RQs) were formed and comprise various literature intellect which further supported an emphasis on solid outcomes. The RQs which were used to explore the primary interest are laid out below (table 1). They have all been mapped to their main and related knowledge gaps.

The three RQs read as follows: What organisational conditions are needed for effective SI? What is the role of managerial agency in effective strategy execution? How do organisations deliberately integrate (1) and (2) to achieve strategic competitive advantage?

Just for clarity and linking to the three RQs listed above - the third RQ refers to "(1)" and "(2)" respectively. This is in reference to RQ 1 and RQ 2.

Table 1: Mapping of Knowledge Gaps to Research Questions.

Knowledge Gaps	Research Questions (RQs)
SI plays out through a series of implementation practices highlighted through the SAP view. There is a void of knowledge in regards to the situated activities whereby, for example, 'monitoring' is put into practice (Friesl et al., 2020). A future focus should include understanding the impact of policy context (active policy instruments) and its link to nudge effectiveness (Löfgren & Nordblom, 2020). There is a need to further systematically link behavioural and more conventional concepts in international business and innovation (Schubert et al., 2017).	**RQ 1** What organisational conditions are needed for effective strategy implementation?
The SAP view underlines human agency. One prevailing theoretical query that emerges is the circumstances and characteristics of managerial agency within SI (Friesl et al., 2020). There is particularly an argument for added analysis of agency linked to social practices (Vaara & Whittington, 2012).	**RQ 2** What is the role of managerial agency in effective strategy execution?
A central and greatly contested facet of SI is the deliberate pursuit of implementing strategy. SI is not perceived as linear in nature. In addition, the materiality of strategy pursuit linked to implementation has gained minimal research attention. One prevailing theoretical query that emerges is the materiality of tools that form how managers interact with the globe – strategy formulation to strategy implementation (Friesl et al., 2020). There is considerable scope in relation to the 'emergence' in strategy-making as well as the	**RQ 3** How do organisations deliberately integrate (1) and (2) to achieve strategic competitive advantage?

material facets of social practices (Vaara & Whittington, 2012).	

The intent of the ensuing paper was to review extant research on SI grounded on the SAP approach. SI is viewed as performing functions of several diverse practices that are demonstrated through activities and the adoption of various tools. The front line of SI involves managerial behaviour, activities, and practices whereby strategy is implemented. These practices are fundamental within enterprises and further demonstrate how they function, additionally highlighting the importance of what bolsters managerial agency, implementation specifics as well as the supportive tools.

The next chapter examines the latest academic literature that reinforced the research study linked to the research problem. The critical review included a focus on the key constructs, an analysis of the pertinent theories as well as the arguments formed. The remainder of this research paper is structured as follows – research methodology and design including the motivation for the selected methodology (compatibility to process), findings of the research results, discussion of the results in relation to the literature review and finally the main conclusions linked to the research discussion. The appendices at the end of the research document consist of a consistency matrix, interview guide, letter of informed consent (template), transcriber non-disclosure agreement (template) and coding manager.

CHAPTER 2: THEORY AND LITERATURE REVIEW

2.1 Introduction

The strategic management branch of knowledge is not determined by a specific theoretical pattern or model. To be exact, it is engaged with general organisational performance and the management component in developing the aforementioned performance. Researchers within the field of strategy are immersed in thought around: What bolsters organisational performance? Why are there variations in success and failure? How can managers influence, if at all? (Makadok, Burton & Barney, 2018). A company's strategy is subject to consistent updates and these updates are linked to changes within the companies' internal and external environment. Strategic management includes analysis, choice selection and the activities initiated by the company to safeguard or establish a competitive advantage. Strategies are thought of as adjustable and not rigid owing mainly to the existence of a feedback loop. This allows for progress monitoring and the resultant reworking of planning (Pröllochs & Feuerriegel, 2020).

A significant formal discussion that manifests itself in the field of strategy is amongst scholars entrenched in opposite views – those fixed on industrial organisation within the field of economics and those fixed on the resource-based view framework (Feldman, 2020). Sertsios (2020) explained that industrial organisation can be grouped into two parts. This first part deals with market structure, for instance 'monopoly', a company's trade-off and responses, as well as achievement. The second part deals with the neoclassical economic approach, namely 'theory of the firm' and this involves how companies arrange their production. Gibson, Gibson and Webster (2021) explained the resource-based view as presenting insights into available resources companies can assemble. It is guided by the principle that resources are valuable, scarce, unequalled and non-replaceable as well as strategic (continued competitive advantage).

It is thought that as a result of this formal discussion around the varying views, the strategy field was split into what has become known as 'corporate strategy' and 'competitive strategy' (Feldman, 2020). The foremost is discussed in more detail below, while Galbreath, Lucianetti, Thomas and Tisch (2019) referred to competitive strategy as the collection of resource allocation resolve company's take to orient themselves in comparison to competitors and within the industry.

The knowledge base of several areas, for instance strategic management and international business, is calling for a consolidation, orderly arrangement and synthesis

of present-day knowledge. Literature reviews play an important part in this as they enable a broad outline within the research field including present and future debates, altering research direction and accumulating knowledge (Kunisch, Menz, Bartunek, Cardinal & Denyer, 2018). Conceding that interaction and interchange across several research fields occur, this could encourage mutual interests and novel understanding around the multifaceted field of strategic management (Ethiraj, Gambardella & Helfat, 2017). With the intention of better understanding the impact of nudging as a behavioural mechanism in SI, the ensuing literature review explores the key constructs employed.

The Venn diagram (figure 1) below is a visual representation of the selected literature scope and indicates how the researcher perceives them fitting together. The area at which all intersect (refer bold arrow) is significant as the answers to the research inquiry are likely to be located within this area of convergence.

Additionally, strategic management does not have a dedicated section allocated within the literature review. It is the overarching field of focus to the research study and as such has been explored within the introduction to lay a solid foundation for the rest to follow.
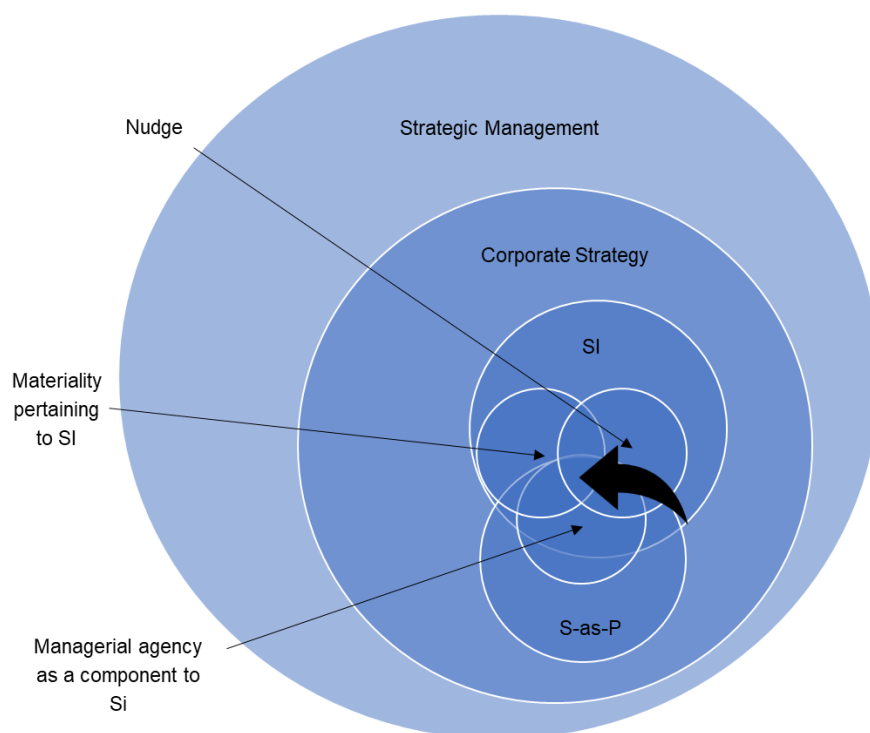
Figure 1: Venn Diagram Indicating Literature Scope.

Note: SI refers to strategy implementation and S-as-P refers to 'strategy as practice' (also called SAP).

2.2 Corporate strategy

Corporate strategy falls into the wide-ranging field of strategy. One of the many questions it attempts to answer is how managers establish and control the scope within their environment. More importantly, any corporate scope decision is likely to have a significant positive or negative impact on shareholder value, operating performance and linked organisational consequences. It would then come as no surprise that these types of decisions are generally significant points of conversation in senior management meetings (Feldman, 2020). Essential is the topic of how firms generate value throughout markets in contrast to establishing competitive advantage inside an individual business. Corporate strategy is concerned with the 'reason for existing' linked to firms with multiple concerns (Mentz et al., 2021).

Frequently, the effect of the corporate strategy choices which companies action do not even closely attain what is expected and, in severe cases, critically fail to resolve the primary concerns that brought them about in the first place. The most obvious reason for this type of actuality is that the concerns are inadequately understood or framed (Feldman, 2020). Analysing representations (internal, external and distributed) is essential as the achievement of strategy centres around understanding how they impact performance (Csaszar, 2018). Nickerson and Argyres (2018) explained that strategising includes two actions; namely formulating the issue within the larger strategic background, and creating solutions that effectively solve the issue. The first action according to them is the more essential of the two, as formulation highlights where to find the probable solution. This seems like a valid argument as it is highly unlikely that the correct solution will be found the first-time round if the actors are blind to the real problem.

Interestingly, Feldman (2020) proposed that as a direct consequence of the previously mentioned dilemma, complete industries for instance 'management consulting' have soared. These industries have in effect been put together around the pressing need for advice around corporate strategy transactions – covering all aspect of implementation and aftereffect. Specific books and custom issues have laid the way for expansion – delivering reading which in turn established the field of study. A finding indicated a significant surge in theory guided research since 2000 (Mosonyi, Empson & Gond, 2019). Management consulting is intended to give specialised support to business management around strategic development – attaining competitive benefits and resolving managerial concerns (Ibatova, Kuzmenko & Klychova, 2018).

Furthermore, business schools have realised the same trend with the lion's share offering corporate strategy and/ or mergers and acquisitions programmes. This highlights the strong need for research intuition and subject matter associated with corporate strategy among professionals. The distinct importance of corporate strategy for professionals and scholars is evident through the common occurrence of publications linked to this theme – a definite ascending trend (Feldman, 2020). Interestingly, international business (IB) research indicates a different trend with a specific focus on 'strategy' as a published topic. They note a decline in topic mention; however, there is an increase in topics such as 'mergers and acquisitions', 'foreign direct investments' and 'family firms' (Buckley & Casson, 2021). Even though the comparison is not like-for-like, it is notable and best explained as not necessarily a shift away from 'strategy' but rather a shift on more specialised types of strategy supported by example through the increase in multinational enterprise (MNE) activity.

Getting back to answering the question of how managers establish and control the scope within their environment, Feldman (2020) suggested that the answer can be assorted into three parts: 1) managers organise resources within the confines of the company (intra-organisational actions), 2) managers organise relationships with alternative companies beyond the confines of their existence (inter-organisational actions) and 3) managers determine which companies fit or do not fit within the confines of their company (extra-organisational actions). A more concrete example of an intra-organisational actions is for instance determining resource allocation. Arrfelt, Wiseman, McNamara and Hult (2015) indicated that a corporate workplace can make two distinct errors when allocating capital – invest excessively within an environment that has fairly modest growth projections, or invest moderately within an environment that has robust growth projections. This can lead to serious implications for the unit and eventually the firm performance, yet to a lesser degree for moderate investment within a strong growth projection. This would seem a good argument yet if firms do not for example invest adequately in technology but their main competitors do, they will always be one step behind.

A more concrete example of inter-organisational actions is for instance the source of strategic expertise and learning that comes about through company associations. The source of learning is no longer through only the amassed experience on the individual manager but also through the relations with their peers (Feldman, 2020). Hernandez and Menon (2018) proposed that acquisitions fundamentally rearrange the network through impacting several connections within a solitary transaction. As a result, resources are

gained – internal gain through ownership as well as external gain through obtaining existing links within the network. By collapsing nodes, it is thought that two types of synergies are created, namely internal ones linked to possession of resources and ones based on network.

Lastly, a more concrete example of extra-organisational actions is the initiation and execution of mergers and acquisitions (Feldman, 2020). According to Karim and Capron (2016), reconfiguration research really involves the pursuits of firms when, for example, adding or recombining resources or professional units. When firms revive their capabilities with the eye on future relevance, the reconfiguration should become a definite root of value creation. Existing resources need to be assembled, re-assembled and dis-assembled as the need arises due to condition fluctuations – the main aim to gain and sustain competitive advantage. Similarly, divestitures are used in reconfigurations too, for instance free-up resources and tighten operations (Vidal & Mitchell, 2015).

2.3 Strategy implementation

SI involves a proportion of organisational change as well as competency development (Friesl et al., 2020). Lynch and Mors (2019) described SI as problematic owing to evidence that it repeatedly entails alterations to the formal structure of the entity. Taking into account the swift changing background, companies are incessantly fine-tuning and reviving their strategy in an attempt to deliver. A particular adaptation method is to alter the organisational structure (employee behaviour) in an attempt to suit the novel strategic path which can involve new responsibilities and roles. As detailed by Friesl and Silberzahn (2017), modification within the subsidiary for example necessitates alignment of competences and linked charters (subsidiary scope of work). This is generally achieved through managerial coordination mechanisms such as experience-based coordination (an array of actions nearing a goal). An example of such a coordination mechanism is when cross-national projects are supported by transnational teams. The global partners support through incorporating mission statements or yearly reviews but more importantly a set of professional standards are used to guarantee quality across locations and to ensure responsibilities are coordinated (Boussebaa, 2015).

Existing research within the field spans across the knowledge branch of strategy and organisation theory (Friesl et al., 2020). The past four decades of SI research have signalled a shift in research to an adaptive notion of SI. Early studies were more centred around developing thoughts in regards to SI plans, forming ideal structures, systems and

oversight for SI. In addition, this view was regarded as largely a top-down stance in regards to the SI process. The adaptive turn notion of SI signalled a shift in research prominence towards the question: by what means do businesses understand and execute strategies in practice? In addition, and in contrast to the previously mentioned view, strategies were not only regarded as emerging top-down but the opposite could hold true through including a variety of actors across the organisation. These exchanges and activities could also be in the form of horizontal interaction between various structural units (Weiser et al., 2020). Heyden, Fournė, Koene, Werkman and Ansari (2017) explained that top and middle managers can perform various strategy roles dependant on their corresponding fortes or weaknesses. What is truly interesting is that their study found better than normal individual support for change when brought forward by middle managers, yet the execution is steered by top management. Perhaps this should not be deemed so surprising, as it could be explained by middle management being closer to the ground and most probably having a better existing trust relationship, yet top managers are seen as visionaries steering the company as needed.

Furthermore, the adaptive turn veered the prominence of theories more appropriate to clarify adaptive organisational behaviour, for example 'discourse' and 'sensemaking'. Managerial sensemaking developed as a vital research branch in relation to the 'adaptive turn' and scholars started to observe how affiliates were grasping strategy within the SI process (Weiser, 2020). Sensemaking is the approach used by individuals to interpret concerns or events whether new, obstruse or unclear. Sensemaking is activated by signals such as problems, events or circumstances such as environmental pushes, organisational dilemmas, identity threats or planned change interventions. Action is an essential part of sensemaking as the world is familiar through doing something and observing what subsequently occurs. Critically, sensemaking empowers various organisational processes such as strategic change, learning, creativity and innovation (Maitlis & Christianson, 2014). Vaara and Whittington (2021) positioned SAP as another example of a sensemaking perspective, where its influence lies in its capability to translate how strategy creation is empowered or inhibited by dominant practices.

There is a greater degree of curiosity into the discursive facets of strategy within the past two decades. The task of strategy comprises various forms of talk, for instance 'water cooler chats', official meetings, press releases and hearsay linked to competitors. These types of 'talk' are linked to building, interpreting and communicating strategy and ultimately strategy in itself is a form of discourse. Initially, discursive strategy viewpoints were regarded negatively as they provoked the status quo. It is also unlikely to reach its

full capability until connections with other phenomenon are made other than linguistic (Balogun, Jacobs, Jarzabkowski, Mantere & Vaara, 2014). According to Mantere and Whittington (2021), the process of developing into a strategist requires a level of identity work (feeling like a strategist). Strategy discourse performs various roles linked to this identity work, enabling an array of approaches. This process of developing into a strategist thus deals with much more than just acquiring the applicable reasoning skills or moving up the hierarchy – individuals must both think and feel the part.

Emanating from Weiser's et al. (2020) review of literature, both formerly mentioned views have separate strengths and weaknesses. The structural control stance assists by analysing implementation planning more systematically and the adaptive turn in SI research has assisted by interpreting the meaning of how various organisations enact strategy. It is with this in mind that there is a recommendation to use the fortes of the two interrelated views and focus on their ceaseless interaction – through forming strategy concepts and enacting strategy. This is visible in figure 2 below and referred to as the integrative view.
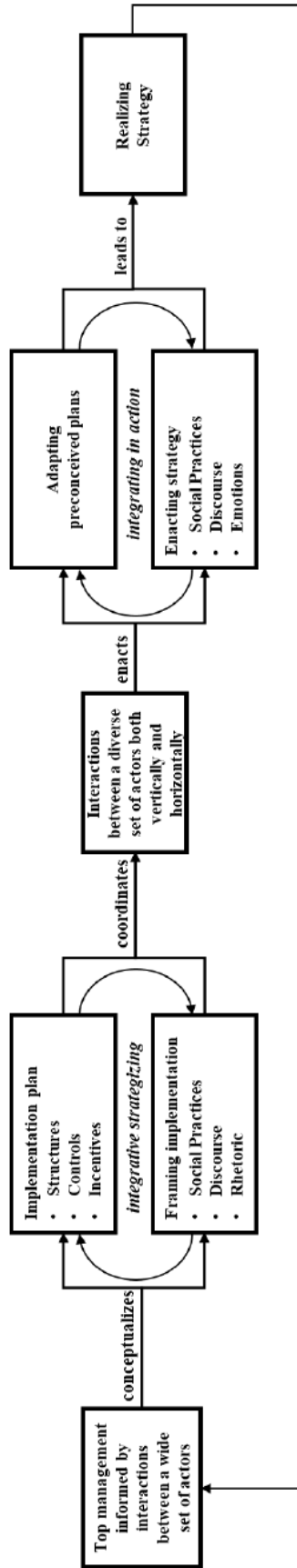
Emphasis: Feedback loop to from enacting to (re)conceptualizing

Figure 2: Integrative View – Competing the Adoptive Turn (Weiser, Jarzabkowski, & Laamanen, 2020, p. 67).

In their review, Weiser, Jarzabkowski and Laamanen (2020) redefined SI in relation to the three central activities that developed – incessant interaction between forming concepts, enacting and combining complex elements (coordination). Jarzabkowski, Lê and Balogun (2019) established a theoretical model to indicate how the activities of individuals throughout the organisation influence the process of strategy and structure evolution as a requisite to achieve profound change. Their contributions included an improved grasp of the impact breakdowns have on change dynamics, the impact of individuals linked to unintentional outcomes or breakdowns, adding to the knowledge of senior management involvement during change management and, lastly, how change coevolves linked to individuals' actions.

As alluded to within the introduction, the research within SI emerges fragmented as a result of the multiple research focal points – spanning from a view of optimum resource and structure arrangement based on the environment, to it being mainly a cognitive struggle with emphasis on sensemaking. Furthermore, SI is outlined as both a flexible process which involves invention and application, and a linear process where diligent planning comes before activity (Friesl et al., 2020). Despite the growth the adaptive turn in SI research has provided, it has also added to the existing fragmentation within the research field largely owing to the two distinct approaches to the SI concept (Weiser, Jarzabkowski & Laamanen, 2020).

2.4 Strategy-as-practice

A conceptual framework used to support or underpin the RQs was 'strategy-as-practice' (SAP). As previously established, the framework enables the detached literature within SI to be synthesised into the five implementation practices, namely: structure and process matching, resource matching, monitoring, framing, and negotiating. These implementation processes can be thought of as the specific work and activities management perform linked to SI. At the core of this perspective is a pursuit to better grasp strategic agency and the capacity of participants to complete work, taking a wide range of constraints into consideration (Friesl et al., 2020). Burgelman et al. (2017) clarified that the focus around the process of strategy has enabled an enhanced view of management decision making with a specific focus on middle managers. The field of focus has encouraged academics to look closer at the roles managers perform and their competence to assist with strategy. This is unpacked in more detail further in the chapter.

The SAP perspective accentuates human agency and develops the thought of strategy as an overt form of work. In essence, SAP positions individuals and habits in the limelight

and enquires as to what is actually accomplished by individuals engaged with strategy, the tools they use, as well as how their context forms their activities (Friesl et al., 2020). The authority of the SAP viewpoint is highlighted through its strength to clarify how the process of strategy is empowered and inhibited by dominant practices and, as a result, has developed extensively within management studies. Also, important to point out is the two-fold meaning of the word 'practice' – on the one hand it indicates a proximity to the practitioner and on the other a devotion to sociological perspectives. SAP research proposes a different decision-making scheme in comparison to the individualistic model which will greatly influence the field of strategy. In addition, these practices abstain from inflexible constraints and rather facilitate modification and iteration (Vaara & Whittington, 2012). Jarzabkowski, Kaplan, Seidl and Whittington (2016) provided a solid example around this when they explained that practices once deemed trivial can be re-established as valued based on a renewed analysis by the actors involved with an eye on the future trajectory. This is perfectly positioned within the uncertain times we face, as well as the nature of strategy that needs to be flexible and adjustable at lighting speed.

The SAP perspective has produced significant insights around tools and approaches to strategy creation (practices), in what manner strategy work occurs (praxis) and the function; and identity of the associated actors (practitioners) (Vaara & Whittington, 2012). To link to the above, the three facets of practice theory that are key to the practice focus within the social sciences have been identified as the 'what', 'who' and 'how' related to practice. The 'what' facet alludes to the practices that are adopted within the entities, the 'who' facet alludes to who completes the specific practice and lastly the 'how' facet is concerned with how practices are accepted. It is the author's collective position that an integrative practice view is central to probing practices within their specific milieu linked to who participates and how they function. In addition, this perspective highlights that strategic output is reliant on the interplay brought about by the 'what', 'who' and 'how' facets of practice. By integrating the three previously mentioned facets, academics can connect practice to performance (Jarzabkowski et al., 2016). This is depicted in more detail in figure 3 below.
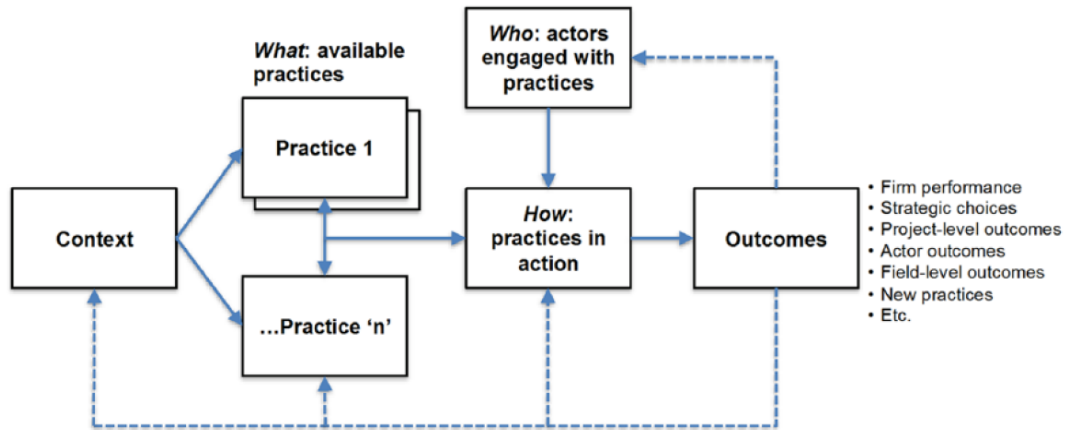
Figure 3: A Schematic Model of Strategy Practice (Jarzabkowski, Kaplan, Seidl & Whittington, 2016, p. 4).

Friesl et al. (2020) distinguished between a 'general practice' and a 'situated activity'. A strategy practice could be general in nature and could take the form of an official company process or routine. Situated activities are linked to specific general practices and are carried out through specific actors. As an example of a practice, Healey, Hodgkinson, Whittington and Johnson (2015) clarified strategy workshops as having become prevalent in companies. Their specific study was focussed on getting a better understanding of the results from these workshops as well as the factors that lead to efficiency. Their analysis reveals that different combinations of elementary design characteristics – namely goal clarity, making routine, stakeholder participation and cognitive attempt – predict different forms of results.

Linked to the above-mentioned focus on activities, the SAP perspective is perceptive to the many actors involved within strategy. These actors are varied in nature and the focus is not just around the elite as set out by traditional strategy work (Friesl et al., 2020). Hautz, Seidl and Whittington (2017) positioned open strategy as capable of growing transparency and being more inclusive in regards to strategic concerns – this includes internal and external stakeholders. As a result, there is a greater amount of existing strategic material at hand and more individuals are becoming involved around the strategy dialogue. The expansion of business schooling, novel technologies and ecosystems dependant on each other are in support of the more inclusive and transparent way to strategise. Additional benefits include superior creativity based on the size and diversity of the contributors, improved engagement, cooperative sensemaking and positive conscious thought. There are however dilemmas and dynamics to be aware of within this practice – these include as an example the 'dilemma of escalation' in which

the advantage of openness within designated areas of strategy generates escalation enthusiasm. This is shown in more detail (including other dilemmas) in figure 4 below.

Granting access to wider sources of knowledge	←	**Dilemma of process**	→	Compromising speed, flexibility and control over the strategy development process
Creating commitment by inviting contributions	←	**Dilemma of commitment**	→	Undermining commitment due to unmet expectations about impact of contributions
Responding to expectations about disclosure of strategy information	←	**Dilemma of disclosure**	→	Undermining competitiveness, trust and understanding
Granting wider audiences a say in strategy development	←	**Dilemma of empowerment**	→	Burdening wider audiences with the pressures of strategy
Realizing benefits of openness in selected areas of strategy	←	**Dilemma of escalation**	→	Creating escalating expectations about increasing openness

Figure 4: Central Dilemmas to Open Strategy (Hautz, Seidl & Whittington, 2017, p. 5).

Regarding 'ecosystems' mentioned above, Adner (2017) explained that the term has grown in popularity owing to the amplified interest and apprehension around interdependence linked to the company and activities. The concept of an 'ecosystem' has enhanced the consciousness and focus on novel models associated with the creation and acquiring of value. Equally important is gaining clarity around when an ecosystem does not improve value. It is imperative in relation to the task to have distinct definitions, notions, relationships and limits. Jacobides, Cennamo and Gawer (2018) took it a step further by clarifying that ecosystems advance value as they enable individuals to manage their multifaceted reliance through groups of roles fronting related rules which avoids entering formal agreements with various partners.

Finally, to conclude the SAP overview, actors require tools to complete strategy work. These tools assist in influencing and facilitating strategic actions (Friesl et al., 2020). Friesl et al. (2018) clarified that, at times, artefacts are used to enable replication strategies – such as manuals. The tools actors use take many shapes and forms; and to illustrate further examples a closer look is taken at the previously listed implementation practices of structure and process matching, resource matching, monitoring, framing and negotiating.

'Structure and process matching' has advanced as a vital practice within SI. Lee and Puranam (2016) explained that a persistent quest for faultless strategy implementation

is particularly beneficial owing to the reality that the majority of strategies being implemented are imperfect. This is based on a model where actions and beliefs are detached (linked to delegation), further supporting the discovery of enhanced strategies through an efficient learning cycle based on existing strategies. Precision around implementation does not guarantee higher profits but is dependent on the suitability of the strategy within the particular industry. It is believed that flawed strategy implementation may be a valuable source for the bottom-up (feedback cycle) pursuit of improved strategies. Another example related to this implementation practice is linked to the unplanned repercussions when structures and processes are intentionally matched based on a novel strategic intent. Jarzabkowski, Lê and Balogun (2019) explained how the activities of individuals across a company coevolve structure and strategy in an attempt to achieve a directed radical change. They propose that this change is brought about by various action cycles which are activated by unplanned repercussions which intensify into breakdowns. 'Performing action cycles' results in unplanned repercussions which are intensified through 'reinforcing action cycles'. This ultimately leads to breakdowns which are key for managers as they empower a change to 'reflecting action cycles'. In this last phase, the espoused strategy and structure is identified as not aligned to the mandate and modification occurs to line up with the purpose.

'Resource matching' entails coordinating resources in unison with the requirements linked to a specific strategic intent – arranging resources fittingly. Resource matching is thought of as a vital precursor to implementation progress and overall performance (Friesl et al., 2020). Hermann and Nnadkarni (2014) provided an example of how an appropriate CEO is found based on a particular strategy. They present two specific CEO personality aspects linked to handling strategic change, namely establishing (content and scope alterations linked to environmental shifts) strategic change and deliberating the performance outcomes linked to implementing (alterations linked to strategic changes) strategic change. A finding within their study revealed that 'extraversion' and 'openness' (five factor model traits) swayed initiation solely, 'emotional stability' and 'cooperative' swayed initiation and performance outcomes linked to implementation and 'conscientiousness' had conflicting outcomes. It is clear why talent selection would be such an important aspect of resource matching especially with its direct link to implementation progress and company performance. An incorrect or inadequate match could have devastating effects on strategy and therefore performance.

Without repeating what has already been established within Chapter 1, 'monitoring' tools can be separated into use for internal as well as external monitoring. It is widely known

that tools that are externally focussed have attracted less academic debate (Friesl et al., 2020). Hu, Leopald-Wildburger and Strohhecker (2017) explained that supporters of the balanced scorecard (internal monitoring) indicate that a varied and strategy-centred performance measure helps in reducing the negative effect of the SI control loop. Through the guidance of the selected strategy, the implementation aspect occurs linked to a number of operational choices with the main aim of lessening the divide between what is being observed and the target. An external example of monitoring linked to SI could include environment scanning. According to Tallon, Queiroz, Coltman and Sharma (2019), environmental scanning enables entities to gain an understanding surrounding the threats and opportunities within a specific market. The appropriate plan can then be put in place which includes resource allocation to support an appropriate response. Furthermore, post implementation reviews allow entities to improve their detection of threats and opportunities. Supported by hindsight, decisions can be formed on how to respond to the alterations within the environment.

'Framing' involves how strategy and its logic are conveyed. There is a close link between framing and other notions such as sensegiving and communication – all adding to the advancement of a common understanding between individuals (Friesl et al., 2020). Falchetti, Cattani and Ferriani (2021) completed a study that looked into how various framings (strategic in nature) stimulated the recognition of new notions. The results of their study revealed that innovators could advance their prospect of attaining support across audiences by simply framing their proposition differently. This was dependant on the know-how of the audience that was considering the prospect. To further clarify 'beginners', for example crowdfunders are grateful when new ideas are framed around the 'why' as opposed to professionals, for example expert investors, who are grateful when new ideas are framed around the 'how'. This is a significant topic around how innovation (new ideas) should be driven within businesses. It can only be beneficial if new ideas are received positively based on appropriate framing (knowing your target) with a predominant focus on linguistic use. Language remains a clear tool and Pan, McNamare, Lee, Haleblian and Devers (2017) explained its importance by highlighting how managers utilise concrete language qualities when interacting with investors. This form of communication is linked to a positive response by investors thus assisting to manage business impressions. They also found that when a company is perceived as risk-free, it is more advantageous to utilise abstract language.

'Negotiating' is the last practice linked to SI and is generally associated with multiple groups interchanging resources or views based on a multitude of factors, for example

interests (Friesl et al., 2020). Guo, Huy and Xiao (2017) explained that middle managers are key within this practice and their essential role is receiving growing academic focus which involves converting comprehensive strategic intent into operational activities. This further involves linking horizontal work teams as well as connecting with customers and other providers. A most recent study highlighted that middle management do not just have bridging roles within the market environment but have in addition been found engaging with political individuals too, in an attempt to attain market efficiency within their specific environment. Middle managers are thought of as better positioned to do this based on their operational know-how and personal networks. It is further believed that companies can boost their strategy implementation capacity by supporting middle managers in engaging these political individuals. There are various tools that are used when coming to negotiations and Arnaud, Mills, Legrand and Maton (2016) highlighted a different example through their study – an ordinary material tool, that is to say, 'text'. A middle manager's work assisted in interpreting a global strategic message to local level implementation in a simplified manner through text, that more importantly made sense to his workers. The particular investigation highlights the importance and influence of strategy materialisations through illustrating how simple 'texts' can be created to encourage sensemaking. These types of skills are fundamental around effective SI.

The future of SI research is greatly bolstered by the SAP perspective. Weiser et al. (2020) explained that it is precisely this prominence on social construction within the strategy-as-practice perspective that has reinforced the rise of the 'adaptive turn' in SI research through enacting and coordinating strategy. Friesl et al. (2020) have reinforced that SI clearly unravels out of a selection of practices such as resource matching and monitoring, but what it has also indicated are the clear gaps in knowledge through which the aforementioned practices are passed. The emphasis on actors, various tools and situated activities have brought forward concealed inquiries into materiality and managerial agency. These are at the core of challenges which management face in regards to SI. These are briefly unpacked as the chapter develops.

2.5 Managerial agency as a component of SI

A critical and deeply contested part to SI is the capability of intentionally implementing strategy which would assume great levels of management control, logic and reason. Strategic intent and the function of managerial agency is indisputable surrounding the five practices highlighted before. Existing research indicates as crucial the necessity to manage a range of activities within SI. It is assumed that individuals within the organisation follow a particular route to action with delays or counteraction not visible.

The real question would be to what degree these proposed levels of control in actual fact exist or not – a question imperative for SI. As previously established, SI is not perceived as linear in approach; rather, its adoptive attributes of implementation have been identified which include the flexibility that enables SI (Friesl et al., 2020). Agency theory was not as dominant in initial SI research when compared to contingency theory (Weiser, 2020). It has continued to surface in articles with a most recent example using agency theory to explain the reasoning behind an extrinsic reward (part of an award program) pushing internal motivation in the wrong direction, resulting in worse punctuality (Gubler, Larkin & Pierce, 2016). The wide-ranging ability of SAP is still to be realised, particularly when it comes to the evaluation of agency (Vaara & Whittington, 2012).

Past research has contributed to traditional agency theory by highlighting the many characteristics of the relationship between headquarters and subsidiary within an MNE. There are many worries around these relationships including the ability of the headquarter to bring the subsidiary conduct into line with the interests of the multinational. This is precisely what makes agency theory an appropriate lens as it emphases in which way the principal (headquarter) make certain agents (subsidiaries) act in a manner that boosts the principal's interests. There are however those that believe that the theory is excessively limiting, hence academics have expanded the agency view to adapt to the intricacies of the modern-day MNE (Ambos et al., 2019). An example from Kostova, Nell and Hoenen (2018) is their model advancement for a unit level inquiry that looked into the main reasons for agency problems, namely bounded rationality and self-concern. They positioned that within the work environment there will always be varying degrees of bounded rationality and self-concern linked to agents. This is based on the internal institutional and external social settings.

Managerial agency remains a dominant notion within SAP research and there are differing views of what agency entitles. Clear is the acknowledgment that norms and structures do inhibit the liberty of individuals. It is accepted that managers are generally knowledgeable – extracting knowledge as required from for instance institutions. It would then come as no surprise that empowering and restrictive conditions surrounding managerial agency has historical importance. Managerial agency is key to any new strategy pursual highlighted by preserving flexibility and the ability to adopt. The factors that inhibit and forge managerial agency within SI are abstruse and very little is known around the ideal conditions required for collective accomplishment. The importance of 'managerial agency' has been set out and this has brought about potential future research inquiry into: which 'resources' would boost managerial agency across levels

specifically linked to deliberate SI and which 'factors' enable supple, coordinated and joint action in regards to deliberate SI? (Friesl et al., 2020).

2.6 Materiality pertaining to strategy implementation

Strategies are regularly captured in briefs, presentations and illustrations; and supplemented with electronic documents highlighting financial forecasts. The strategic objectives linked to a specific strategy are in turn shared with employees through, for example, circulars or electronic communication and these are linked to key performance indicators in an attempt to incentivise achievement. As is evident, SI includes a variety of digital and physical components yet very little is known around their effect or, in SAP terms, their 'materiality' (Friesl et al., 2020). Actors approach their daily affairs by using various material objects which have a particular materiality. Demir (2015) explained how strategy actors drive strategic conduct in spite of not physically being present. The study further shows that when corporate welfare and individual ambitions are interwoven into affordance (quality or property of an object) bundles, the individuals approach alters. For instance, they are motivated to act strategically and on intuition. Werle and Seidl (2015) referred to the layered character of materiality which consists of physical and non-physical artefacts and more importantly their dynamic interaction linked to the strategy process.

There has been limited academic attention given to materiality and its link to SI (Friesl et al., 2020). An example is Friesl, Stensaker and Colman (2018), who explained that the interest around the part materiality plays within strategy work was established at the same time the role of artifacts was explored. It was precisely this artefact-action connection that provided more precise insights into how the use of artefacts can constrain replication strategies as well as the possible logic behind replication strategies falling short. Leonardi (2015) positioned that for the sake of materialising strategy (bring into existence), strategy originators must have the ability to understand the worth of the material that will be used to implement a specific strategy.

2.7 Nudge

Close to a decade after Thaler and Sunstein's book, *Nudge*, nudges grew into an extensively applied end-user affect strategy. An example of this is nudge marketing – convincing consumers to behave accordingly through 'nudging' them by means of marketing communication whilst maintaining a balance of not being too delicate nor to coercive. The deliberate interaction altered the way in which the selections were presented to end-users with the objective of swaying consumer choice. An example of

this would be directing customers towards the fresh produce run by placing green decals on the floor indicating health benefits in the specific direction. Behavioural economic research has shown that nudges are efficient at manipulating consumer behaviour (Dholakia, 2016). What has followed this success is the venture of firms to assemble behavioural science teams otherwise known as 'nudge units', generally positioned for all in the firm to reap benefits from. This type of configuration would ensure a sustainable unit with aptitude and resources at the very centre of the firm – ensuring enhanced results for all (Martin & Ferrere, 2017). These nudge units are growing in popularity and not just as expected within enterprises – countless governments have effectively adopted these units too (Della Vigna & Linos, 2020). This must be an indication of what lies ahead.

The theoretical model in figure 5 was used to support or underpin the RQs, and elucidates the elemental mechanisms that prompt detached decision-making and reaction to behavioural engagement such as nudges. This specific decision-making model consists of two steps; the first whether a choice should be made attentively or inattentively. There is a definite compromise in regards to the cost of the attentive selection and the significance of selecting erroneously by an inattentive selection. The second step is where the actual choice is made between 'x' and 'y' (Löfgren & Nordblom ,2020). Decision-making within strategy carries out a significant purpose in the modern era. Critical care needs to be given to the exploration of patterns and appropriate support to enable improved decision results. It is indispensable to first grasp how decisions are formed and where things can go amiss (Behavioural Economics Guide, 2020).
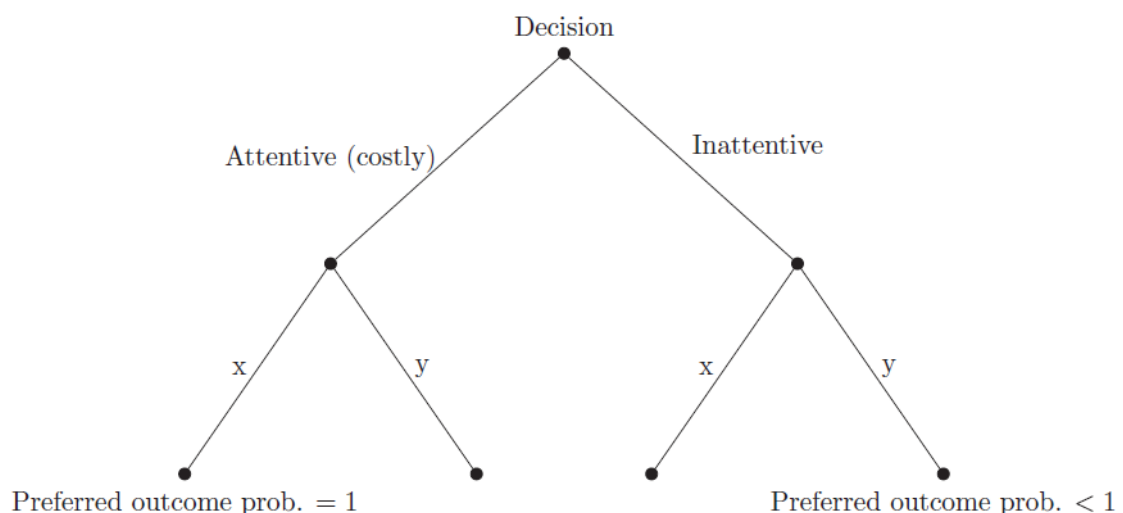
Figure 5: The Decision-making Process (Löfgren & Nordblom, 2020, p. 3).

Reverting back to the theoretical framework of decision-making detailing the components of nudging, the framework makes it possible for us to grasp these components as well as what potentially could result in a behavioural intervention. The model offers conjectures into the efficiency of a nudge within a dissimilar choice circumstance. Two types of nudges are distinguished; namely pure and preference nudges. An example of a pure nudge is cutting down on the cup size through a default option and an example of a preference nudge is prompting individuals to recycle according to type which is the right thing for the environment (Löfgren & Nordblom ,2020). The elevation of behavioural economics within the past period was a result of collective research with Richard Thaler (awarded the 2017 Nobel Memorial Prize in Economics) playing a dominant part early on. The most central factors that supported the swift growth within the field were inconsistencies around the conventional paradigm, novel models, progression around abetting individuals to make improved choices, and the influx of gifted researchers (Barberis, 2018).

As previously alluded to, the model involves a two-step process. The attentive choice (System 2) is where the individual makes an informed and full rational choice as a result of a cost or cognitive effort. On the contrary, the inattentive choice (System 1) is where the individual bases the choice on heuristics to sidestep any cost. The only concern with the latter is that the choice comes with a risk of being awry. During step 2, the decision initiator in actual fact makes the choice. According to this specific study, one is not receptive to nudging should one make an attentive choice. On the contrary, if the choice is inattentively made, one is prone to the two kinds of nudges as formerly established. The model goes further to show that the probability of a nudge having impact is considerably higher for choice options the individual perceives as insignificant. In contrast, the choice options the individual perceives as significant are all but impossible to be influenced by a nudge. Levels of confidence also play a leading role in terms of which type of nudge would be more effective (Löfgren & Nordblom ,2020).

2.8 Conclusion

This literature review has outlined the necessity of the research study to explore and analyse the impact of nudging as a behavioural mechanism in SI. This is further supported by the knowledge gaps as outlined in Chapter 1 (table 1). SI is of critical concern owing mainly to the abundant struggles with regards to strategic actions and envisioned results. To add to the complexity, there is no integrated knowledge field (Friesl et al., 2020). The SAP perspective lends a hand in this regard and SI is considered a form of strategy work that develops through, for example, tools used to execute

strategy. Five implementation practices have been identified with a focus around 'monitoring' owing largely to its behavioural elements.

Based on the literature review and leading into Chapter 3, the following themes have been developed inductively, namely 'organisational conditions', 'managerial agency as a component of SI' and 'materiality pertaining to SI'. The next section depicts the research design, methodologies and tools employed during the study. These were aligned to the research aims and questions that have previously been established. The chosen methodology is motivated as suitable to the particular research problem.

CHAPTER 3: RESEARCH QUESTIONS

The research questions laid out below were formulated in line with the wide-ranging literature review across the subject fields of strategic management, corporate strategy, strategy implementation and nudge. This links back to the intent and scope of the research study as well as the knowledge gaps as indicated in Chapter 1 (refer table 1).

As captured in the research title, the predominant enquiry is into the impact of nudging as a behavioural mechanism in SI.

Research Question 1: What organisational conditions are needed for effective strategy implementation?

This RQ was intended to identify the organisational conditions that are required for effective SI. This was achieved by gaining the insights into the extent respondents view strategy formulation and implementation as a structured process within their environment, how externalities are considered linked to this process and lastly despite the effect of these externalities in what way responsiveness was put together related to the strategy formulation and implementation cycle with the aim of supporting continuous innovation.

Research Question 2: What is the role of managerial agency in effective strategy execution?

This RQ was aimed at establishing the role of managerial agency linked to effective strategy execution. This was explored through gaining an understanding of the extent to which managers influence strategy formulation within their environment and the level of operational discretion managers are provided to translate the strategy into workable components. Furthermore, resilience ratings were probed, linked to the strategy formulation and implementation chain around unanticipated external events; and subsequently the level of impact managers have on this level of strategic resilience.

Research Question 3: How do organisations deliberately integrate (1) and (2) to achieve strategic competitive advantage?

This RQ was designed to further probe how organisations purposely integrate RQ 1 and RQ 2 to attain strategic competitive advantage. This was accomplished by inquiring which tools and practices are generally used within the strategy implementation process, how constant monitoring takes place to ensure their effective usage, and by what means information resultant from monitoring is retained and reviewed.

CHAPTER 4: RESEARCH METHODOLOGY AND DESIGN

4.1 Introduction

In this chapter, the emphasis is placed on the research design and methodology as adopted within the research study. The literature review completed in Chapter 2 marked the initial starting point for input into the research design and methodology, in addition to laying the foundation for the developed interview guide. From a research design point of view, this research followed an exploratory route with the aim of defining and clarifying new connections between phenomena. This type of research was conducted within the field where there is propinquity to the context through conducting interviews with 'specialists' on the topic (Saunders, Lewis & Thornhill, 2019). Linked to the exploratory approach and as alluded to, the research study followed a qualitative approach. This type of enquiry looked to uncover and explain, through a narrated account, how individuals went about their life; and specified what their deeds signify to themselves (Denzin & Lincoln, 2018).

4.2 Research design

The rationale behind the selected method was to ultimately support further understanding of what was emerging – unpacking insights that were not quantifiable. The researcher was vital throughout the data collection and this process included several methods, for instance semi-structured interviews and linked observations. It truly started with the researcher forming the outline of what they wanted to find out and the research design then followed. The researcher designed the interview questions that would enable the appropriate data to be collected (Bell, Bryman & Harley, 2018). As is evident within the literature review and through the exploratory research route. the researcher has in upcoming chapters concluded the significance of the findings in the form of induction.

The intent of the research study was to contribute to filling the multiple knowledge gaps as identified in Chapter 1. Above and beyond the three main themes of 'organisational conditions', 'managerial agency as a component of SI' and 'materiality pertaining to SI', the researcher was hopeful to probe into the impact of nudging as a behavioural mechanism in SI. The study was focussed on gaining a more enhanced understanding of the organisational conditions that are required for effective SI, the role of managerial agency linked to effective strategy implementation, and the deliberate integration of both to attain strategic competitive advantage.

Exploratory research further entailed placing the respondents' viewpoints as central. The researcher needed to recede to gain subjective views and ensured that the environment

was conducive to this degree. As the data developed, novel insights were gained within the developing design. Raw data needed to be managed by the researcher and the most important step involved within this process was to the review for any apparent flaws (Bell et al., 2018). Suitable time was required for reflection as the researcher, which in turn enabled patterns to immerge and supported latter conclusions. The forte of exploratory research therefore lay within the ability to personally interpret the phenomena and share the all-inclusive picture. Exploratory research might have started out as a wide-ranging focus yet this has become more precise throughout the progression of the research (Saunders et al., 2019).

Linked to this, the approach to theory development was that of induction owing to developing theory through the review of data (Bell et al., 2018). This was ultimately attained through an improved understanding of the essence individuals attributed to events, highlighting novel insights. Inductive (exploratory) study was simultaneously limber in structure and this enabled alterations in research prominence during the progression. Research linked to an inductive approach was more focussed on the context linked to events (Saunders et al., 2019).

From a research philosophy point of view, the interpretivism route was aligned with the qualitative design. The dominant concepts that influenced qualitative research were dissimilar in comparison to quantitative research – features included the reflexivity nature that developed as part of the research journey (Flick, 2018). As was commonly accepted, the general research dilemma led to the research design and methodology. The RQs indicated an interpretivist study with a distinct open-ended inquiry. The approach applied was ajar to various channels of enquiry. The focal constructs (focus on the study) within the RQs were organisational conditions, managerial agency and materiality ultimately linked to SI.

The philosophical assumptions that underpinned the study were grouped into three main areas namely ontological, epistemological and axiological (Bell et al., 2018). Ontologically, the nature of reality was diverse, linked to various perspectives which moreover supported the qualitative characteristics. In turn and directly linked within the research the results were diverse outlooks associated to themes – this was central during data analysis. The researcher was ultimately shaped by his ontological assumptions, that is to say the way he perceived and studied the research entities (Saunders et al., 2019).

Epistemologically entailed the relations between researcher and SI being explored through 'nudging'. There was a strong sense of subjectivity owing to the respondents' evidence and personal interpretation from the researcher. More importantly, the researcher's involvement in the research – proximity to the context, phenomenon and research participants – manifested as evidence of engagement in the form of quotations as the researcher build rapport with the respondents with the ultimate aim of transforming into an insider. The theories, notions and research engagements that were available were used to open up 'thinking', formulate that what emerged linked to theory; and sought further clarification of meaning and new connections (Denzin & Lincoln, 2018).

Axiologically, the values contributed to the research process. There was a genuine understanding of how the researcher was influencing the research process. This included the biases that were imposed on the 'data collection' process. Additionally, it was imperative when interpreting the data that the researcher stayed clear of his own views – the focus was on others at all times. The chosen philosophy was an image of the researcher's values similar to one's preferences relating to data collection (Saunders et al., 2019). The researcher attempted to continuously make his authorial perspective visible to the reader, thereby highlighting the dual importance of the research process and content of data. Possible researcher and respondent biases were plainly identified.

The completed research study has contributed to the existing, pertinent and mounting literature around strategic management, corporate strategy, SI and nudge. This was achieved through the empirical findings. In addition to having gained a better understanding around organisational conditions required for effective SI, the role of managerial agency linked to successful strategy execution and their deliberate integration to achieve strategic competitive advantage, the overall research contribution will be more pronounced around having drawn attention to behavioural mechanisms such as nudging and their impact on SI – integration of behavioural and established concepts.

4.3 Population

The population of cases that were pertinent to the research interest were individuals within MNEs operating across the globe. Narrowing that down, the researcher's target population comprised of MNEs across developed and developing nations with various spheres of operation. The ultimate reason for choosing MNEs is that they are big enough to have a structured approach to strategy formulation (Roscoe, Skipworth, Aktas & Habib, 2020). In other words, they follow a systematised approach to strategy formulation

and strategy execution. Furthermore, the researcher focused on qualifiers (see Appendix 2) that were considered prior to the interview and individual selection – the first relating to organisational selection and the remaining two relating to individual selection. The thinking around this was to ensure that if an organisation or individual did not meet the qualifiers, they were excluded from the sample thereby saving precious time and supporting a focussed study.

4.4 Unit of analysis

The unit of analysis simply entailed the 'what' and the 'who' the researcher was looking at. Within the research context, the study examined middle-level managers and up within the qualifying MNEs; and participants who have had direct experience of SI tools or practices (see qualifiers QQ 1.2 and QQ 1.3 – Appendix 2). These qualifiers were considered before individuals were selected and if any were not met, the participant was not approached to participate. These were deemed important criteria as middle-level managers specifically are answerable to the next level but more importantly apply more time to directional and organisational functions. The level above is mainly concerned with strategic planning and execution for the total business. These MNE managers were what is termed the researcher's units of data collection. The research analysis was at an individual level, although there were implications at team, unit or organisational level.

As can be seen from the line of questioning in the interview guide (see Appendix 2) that respondents were asked to give a view on higher-order units of analysis, although always from an individual perspective. Bell et al. (2018) explained that research questions are inclined to furnish a directive related to what categories of individuals (unit of analysis) are to be targeted and subsequently sampled.

4.5 Sampling method and size

The aforementioned criteria were used to draw the research sample frame which is a comprehensive list. Sampling techniques within qualitative research are made up of non-probability sampling. In other words, the probability of selection is not equal and there is a definite sampling bias that is present which further supports the researcher's previous note that generalisation within findings is not probable. In actual fact, qualitative research is not generalised but rather transferred. The specific sampling technique that would be most suited to the research is the purposive or judgmental qualitative sampling (Bell et al., 2018). Personal judgment was applied to carefully chosen respondents with the main objective of the ability to answer the RQs – further enhanced through the use of prior qualifiers. Samples were imperative as entire population surveys were not practical.

In addition, the researcher made use of snowball sampling linked to two MNEs. This proved especially useful around attaining two participants within two South African headquartered MNEs. The initial work was done by the researcher, yet the second participant was attained through directly asking if there was someone (within their work environment) the respondent could think of that might be interested in the research or that could add value. This was done right at the close of the interview and the qualifiers (see QQ 1.2 and QQ 1.3 – Appendix 2) were then also positioned. Saunders et al. (2019) positioned that the issue around bias linked to these samples are vast as respondents are more likely to associate with individuals that are the same as themselves. This could result in a potential homogenous sample. This could very well be the case, but it only applies to two out of twelve individuals and the qualifiers are still the over-arching funnel for selection.

The sample in this study was obtained from the researcher's professional network and was comprised of respondents from developed and emerging economy MNEs with headquarters in South Africa, Australia, New Zealand and America (see table 2 below). These in turn had a sphere of operations (where the respondent was based) in either South Africa, Australia, New Zealand, Italy or the United Kingdom. The MNEs with headquarters outside of South Africa only consisted of one respondent per sphere of operations. Even though this could be seen a possible limitation within the research study, the point was to ensure a more global representation of data with a representation of MNE headquarters within three continents namely North America, Africa and Australian-New Guinea as well as New Zealand. From a spere of operations point of view, the sample came from three continents, namely Africa, Australian-New Guinea and Europe; and two island nations namely New Zealand and the United Kingdom. In addition, the total sample of twelve respondents work within seven industries: Financial Services, Management Consulting, Marketing & Advertising, Retail, Food & Beverages and Package/ Freight Delivery.

Table 2: Brief Description of Chosen Sample.

Industry/Sector	Co.	MNE HQ	Sphere of Operations	No. of Respondents
Financial Services	A	South Africa	South Africa	2
Management Consulting	B	South Africa	South Africa	2
Marketing & Advertising	C	South Africa	South Africa	2
Retail	D	South Africa	South Africa	2
	E	Australia	Australia	1
Foods & Beverages	F	USA	Italy	1
Package/ Freight Delivery	G	New Zealand	New Zealand	1
Real Estate	H	USA	UK	1
			TOTAL:	**12**

Note: Co. refers to company, MNE refers to multinational enterprise, HQ refers to headquarter and No. refers to number.

Referring to sample size and linked to the RQs and purpose, a heterogeneous sample was most suitable for the study, as it most strongly favoured academic transferability of the findings to a variety of organisational contexts and geographic locations. A heterogeneous sampling method enabled a 'compare-and-contrast' analytical approach visible in the latter chapters of the study. This entailed a minimum of 12 comprehensive interviews. The explicit minimum was necessary and enabled comparisons and adequate conclusions to be drawn during the course of the study.

In the interests of achieving a minimum level of data saturation within the time constraints of the study, a minimum of 12 interviews were further supported. The sample was comprised of individuals drawn from eight companies with no more than two respondents per company. Each South African headquartered MNE had two respondents and the

balance of MNEs with headquarters in Australia, New Zealand and America had one. This suggested a total sample of N = 12. Bell et al. (2018) positioned that the question around sample size is a balance between time and cost; and for instance, the necessity for accuracy. Saunders et al. (2019) suggested in the range of 12 to 30 participants intended for a heterogeneous group.

As the individual managers within the MNEs were the unit of analysis, there was no organisational consent required for the research to proceed. The individual managers, however, were requested to complete an informed consent letter (see Appendix 3 for template). Sample size is ultimately linked to data saturation. Saunders et al. (2019) advises that data should be collected until such a point as the data provides diminutive novel information or novel themes.

From 12 documents, first level codes were identified and were thematically categorised into 69 (191 codes) code groups. The themes are too extensive to list, however, it is important to point out that they were built around the ten interviews schedule questions (see Appendix 5 – Coding Manager). In addition, there was a general question (referred to as GC within Appendix 5) that was coded to. This question was not listed on the interview guide but it was posed right at the end of the interview, asking if there were any last comments or insights from the respondent. This specific coded section produced 15 codes.

With the use of ATLAS.ti 9 the code document table for the 12 transcripts and 69 code groups were exported; and placed into a graphical depiction (see figure 6 below). The number of codes per interview were then arranged in sequential order. From figure 6 below it is evident that data saturation had not been reached yet, however the trajectory of the bar graph does indicate that new codes were in decline until interview 11. The most reasonable explanation for this was that the last interview was data rich in nature – the length of the interview was slightly over the average of 32:02 minutes. The interview with the most codes produced 71 codes and the interview with the least codes produced 27 codes.
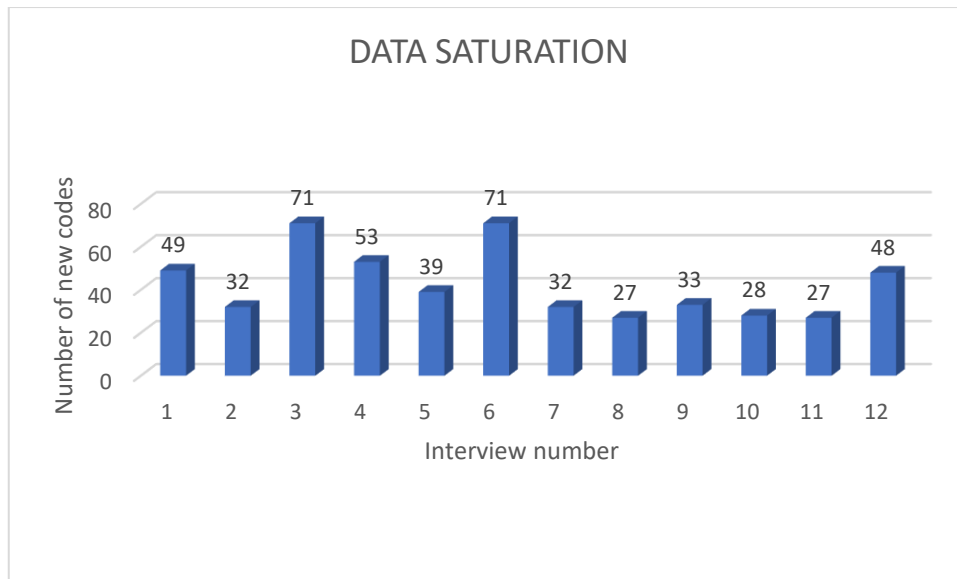
Figure 6: Data Saturation within Sample Interviews.

4.6 Data collection tool

Semi-structured interviews are regularly linked to qualitative research methods. There is a starting point of proposed themes and noteworthy questions linked to these, thereby assisting in guiding the interview. How the themes are used will depend on the researcher's philosophical assumption – the interpretivist approach is prone to be more flexible and reliant on what the participant actually reveals, for example novel themes to be explored might emerge (Saunders et al., 2019).

A semi-structured interview guide was developed with clear line of sight between themes, RQs and interview schedule questions (ISQs). The three RQs that were formed in Chapter 3 are listed against their respective ISQs (ten in total) (see table 3 below) indicating consistency (For the full interview guide please refer to Appendix 2). With reference to the flow and sequencing of the overall line of questioning, questions build on previous questions and become more summative towards the end of each subset of ISQs

What is not visible from the interview guide is the welcoming that took place from the onset and additional questions that were posed at the end of the interview. Respondents were firstly thanked for their time out of their busy schedule as well as expression of the wish that the research might be of value to them too. There was a comment made around having seen the title of the research and respondents were specifically requested to forget about any specific words they might have seen during the communication leading up to the interview. Clarity was provided that the researcher was purely interested in their

experience. It was then briefly explained that there would be ten ISQs and that they were split into three themes. Josselson (2013) clarified the research relationship as key during narrative interviewing and should be taken care of along the research process. Respondents are to be dealt with in a respectful, sensitive and tactful manner. Our expectation as researchers should be that the interview process is a decent encounter for all participants.

As alluded to earlier, respondents were all asked for any last comments or insights at the close of the interview. In two cases, a request was made for anyone that came to mind that they believe would add value or be interested in taking part in the research (snowballing).

Table 3: Mapping of Research Questions to Interview Schedule Questions.

Research Questions (RQs)	Interview Schedule Questions (ISQs)
RQ 1 What organisational conditions are needed for effective strategy implementation?	**ISQ 1.1**: To what extent is strategy formulation and implementation viewed as a structured process within your organisation? Please elaborate. **ISQ 1.2**: How does your organisation take externalities into account within this process? **ISQ 1.3**: How does your organisation build responsiveness into the firm's strategy formulation and implementation cycle to support continuous innovation despite the impact of externalities?
RQ 2 What is the role of managerial agency in effective strategy execution?	**ISQ 2.1**: To what extent do managers in your organisation influence strategy formulation? Please elaborate. **ISQ 2.2**: What level of operational discretion are managers in your organisation given to translate the firm's strategy into executable components? **ISQ 2.3**: On a scale of 1 – 5, how would you rate the resilience of your organisation's strategy formulation and implementation chain to unforeseen external events? Please substantiate your ranking. **ISQ 2.4**: To what extent do managers in your organisation impact this level of strategic resilience? Please elaborate.
RQ 3 How do organisations deliberately integrate (1)	**ISQ 3.1**: What tools and practices are commonly applied in your organisation to the process of strategy implementation?

and (2) to achieve strategic competitive advantage?	**ISQ 3.2**: How does ongoing monitoring take place to ensure that both tools and practices are used effectively?
	ISQ 3.3: How is the information derived from monitoring retained and reviewed within the organisation? Please elaborate from the perspective of both current evaluation and future planning.

Having used interviews, the researcher gained the subjective experiences of the distinct actors to further knowledge. Emphasis was placed on respondents' interpretations of their experience in regards to the aforesaid phenomena. This led to pattern identification through the results and potential additions to the knowledge.

As formerly established, the researcher was interested in the impact of nudging as a behavioural mechanism to enable SI. However, when coming to the design of the data collection tool or interview guide, the following were key considerations. Aligned to the use of qualifiers and the exploratory nature of study, 'nudging' was never actually mentioned in the line of questioning. This removed all potential bias (both researcher and respondent) from the questions and data was therefore not contaminated as there was no implicit desirable construct. In addition, the notes to interviewer proved quite helpful to not only the researcher but they were also used to ensure all respondents had the same understanding around key word definitions.

4.7 Data

The particular demand for this research design ascends from the eagerness to comprehend complex phenomena (Yin, 2009). As far as the research is concerned, the qualifiers acted as a funnel towards the researcher's distinct angle of interest. The selected participants linked to their respective MNE provided a perspective on the phenomena under investigation and ensured a level of heterogeneity given the diversity implicit in the sample frame discussed earlier. The research was cross-sectional rather than longitudinal in nature and the findings will be both time- and location-bound. Nonetheless, it was hoped that the composition of the sample would permit a level of academic transferability.

The data collection method comprised of semi-structured interviews with organisation and individual selection guided by the three qualifiers. Interviews were completed by using the online platform of Zoom. This was further supported by the ability to record the interviews with the available functions. Before any actual respondents were interviewed, the researcher completed a pilot interview to test the basics and parameters surrounding

the interview guide. According to Bell et al. (2018), the appeal to piloting interview instruments is not just around whether the actual questions function aptly but is more focussed on the total functionality of the research instrument in question. Incessant concerns that are picked up can then be resolved or corrected. More than this, Josselson (2013) explained that the researcher themselves need to reflect on who they are in preparation for the interview. This involves introspection around assumptions or predetermined ideas linked to a specific participant or narratives. In an attempt to receive information, the researcher needs to be able to let go of the previously mentioned attitudes or thoughts.

Participants were reminded that there are not correct or incorrect answers and that the researcher's main objective was to gain their actual experience. A printed copy of the interview guide was used to make notes per interview and this was collated into a master document. Together with the video recordings, these were used to conclude insights.

Data needed to be appropriately protected and a big part of this involved the storage thereof. The risk of personal data identifying individuals was immense. There were various manners in which to disguise personal data such as using pseudonyms and blurring identifiers on video recordings. Specific attention was placed on the storage of original content by the researcher which included personal identifiers. Audio recordings of the interviews were placed in a OneDrive folder which was password protected but enabled the transcriber to access them as they became available. Importantly, before any recordings were shared the transcriber was required to complete a transcriber non-disclosure agreement (see Appendix 4). Transcripts were sent back and before loading into ALTAS.ti 9, all identifiers were removed.

At all times, the emphasis was placed on storing these types of data in safe and secure places. Cloud services are not advisable, but the researcher thought them more reliable than sending via email. When the researcher set out to wipe-out data, physical documents were shredded and device files needed to be permanently deleted. By following a data management plan, the anonymity of individuals and their privacy still remains intact (Saunders et al., 2019).

4.7.1 Data analysis

In the data analysis process, a key first step was to prepare the qualitative data for analysis. All qualitative interviews were recorded hence the first logical step was to have them transcribed. During interviews, observation is fundamental especially around tone and non-verbal cues. It was invaluable to record the context per interview, by for

example, using a research notebook and referring back to it during analysis. This is just one tool that was helpful (Saunders et al., 2019). A research journal and the researcher's field notes were used to cross-check against the interviews to ensure that the respondents' underlying meaning and contextual relevance was not lost during the transcription process. Where necessary, brief clarification notes were added to selected respondent quotations.

Thematic analysis is a wide-ranging approach to examining qualitative data. The crucial purpose is to identify patterns and themes that surface across the date set. The coding of data as per pattern and theme identification is connected with the RQs. This specific type of analysis is systematic and logical in nature. By using this approach, which is relatively straightforward, researchers can rather focus on ensuring the analysis is meticulous (Saunders et al., 2019). Thematic analysis was used as previously highlighted – codes were identified and code groups created. In addition, frequency analysis was incorporated to enhance the research analysis. Bell et al. (2018) described computer-assisted qualitative data analysis (or CAQDAS) as a substantial change linked to qualitative research since the 1980s. In essence, it takes away the clerical responsibilities related to coding and recovering data. As previously alluded to, the researcher's choice of CAQDAS was ATLAS.ti 9.

The adoption of analytical tools such as ATLAS.ti undoubtedly assisted during the qualitative data analysis. This took many forms such as data administration, exploration, close proximity to data, coding and so forth (Saunders et al., 2019). These tools are invaluable when coding and analysing large quantities of data. Interpretation of the findings still remain the responsibility of the researcher. It is imperative to prepare accordingly by familiarising oneself with the chosen analytical tool (Bell et al., 2018).

4.7.2 Data quality (validity and reliability)

There are various data quality issues associated with semi-structured interviews. This is largely a result of the preparation for these interviews – the necessity to guarantee data quality. Concerns relating to validity and reliability can be subdued by having a better understanding of why interviews were chosen from the onset, identifying that all methods have limitations and preparing meticulously for these interviews. This assists by not placing validity and reliability into the spotlight (Saunders et al., 2019). Interview preparation was a fundamental focus throughout the 12 completed interviews and a key focus was to maintain the same standards across all interviews. Besides all audio recordings being driven through Zoom, the researcher also used a phone as a back-up recording device in case of technological failures or Zoom recordings being unclear. The

fact that professional transcription services were employed was a solid contributor to data quality.

With regards to reliability (dependability) surrounding semi-structured interviews, the obvious point is that these types of interviews are not necessarily intended to be repeated owing to their unique context. Despite this, the researcher needs to clearly explain the design choice as well as the rationale behind the strategy and methodological choice as this will assist in supporting the findings as dependable (Saunders et al., 2019). In addition, and further linked to reliability, the researcher already made mention of using a pilot interview. Adequate exposure and training on ATLAS.ti 9 was secured by watching most tutorials as available on the opening page of the workbench.

From a validity (credibility) point of view surrounding semi-structured interviews, soaring levels of success can be achieved. Of utmost importance is the use of clarifying questions, exploring interpretation as well as responses. As a result, trust is built and rapport is achieved. Cases that are counter to what is perceived as normal are equally important and an opportunity to achieve credibility – explanations and reflections are required (Saunders et al., 2019). Credibility was further achieved through using ATLAS.ti 9 and linked to the transparency that CAQDAS offers. Triangulation also played an important role around this aspect with many facets to compare such as geographical location or type of economy.

The research instrument was pilot tested prior to use in the field with the aim of improving the interview guide. This supported the intention of assessing the reliability in regards to questions as well as the validity of the data. In the most basic form, this process assists with the face validity of the interview guide. This is important because it assesses whether or not the questions appear to be logical. This process further entails verifying whether all questions and instructions were understood (Saunders et al., 2019).

The notion of triangulation within research is best understood as multiple points of perspective. The use of multiple data sources in this study strengthens the validity of the research conclusions which greatly assists with weathering academic critique. The main intention should be to further the breadth and depth of data analysis – to go past the knowledge that may be evident through the use of a homogeneous sample, thereby promoting quality research (Denzin & Lincoln, 2018). The researcher better understands this by thinking about the specific approach – involving MNEs in the research from across the globe (developing as well as developed markets).

4.8 Ethics consideration

Research ethics talks to the norm of behaviour that shapes the researcher's conduct linked to the rights of the research participants or other affected individuals. It is furthermore important to take note that ethical concerns can ensue at multiple stages of the research (Saunders et al., 2019). Academic integrity was of utmost importance during research framing and the aim was to stay clear of academic misconduct, for instance fabrication or plagiarism. Ethical basics within data collection entailed four key principles namely ensuring that no distress is brought to respondents through questioning, informed consent was given prior to engagement, and respect for privacy must was core. At no time was the participant deceived in any way or form.

The researcher conceded to the university's ethical requirements (Saunders et al., 2019). Part of this is linked to the informed consent letter, which attempts to confirm that the likely research participant is provided with sufficient information regarding the study so that an informed decision can be made around taking part (Bell et al., 2018). These principles were outlined on the researcher's informed consent letter template as included. To further support this point, the researcher received ethical clearance prior to any data collection taking place.

4.9 Research limitations

As far as limitations were concerned within the methodological assumptions, the researcher investigated the identified research phenomena within the confines of the chosen sampling frame. As such, and as is typical of qualitative research, transferability was limited. This could be mitigated in future studies by the additional depth provided by a case-study approach, or the breadth provided by a large quantitative sample. A longitudinal study would also add more rigour to future research on this topic.

Other shortcomings include the fact that qualitative research design is not quantifiable and verifiable as it focusses on the subjective insights of the researcher as these relate to the phenomena under investigation. As a result of the emphasis on a natural setting which is diverse across individuals, the design is not readily replicable. Other disadvantages specifically relating to qualitative interviews include that the interviewing is less natural, offers restricted ken into how language naturally develops, is restrictive when it comes to ken into social interplay and behaviours, is not beneficial when revealing concealed activities and reduces flexibility when faced with unforeseen matters (Bell et al., 2018).

Despite all this, it was possible to achieve a measure of generalisability just as long as conclusions were tentative. It will be imperative in future research to expand the sample so that one could better argue that the findings could be applicable within other organisations, contexts or geography.

CHAPTER 5: RESULTS

5.1 Introduction

The focus of this research study was to establish which organisational conditions are required for effective SI, the role of managerial agency in effective strategy execution, and in what way organisations deliberately integrate the preceding concepts to attain strategic competitive advantage. In this chapter, the results from the completed field interviews are presented. These are laid out according to each individual RQ as detailed in Chapter 3. Furthermore, this section reveals the results of the 12 individual semi-structured interviews as demonstrated through the interviewee insights, points of view and awareness.

Moving on from the introduction, the sample description and presentation of results follow. The ISQs were constructed and refined through using a consistency matrix. This matrix linked the RQs with their distinct literature gap and assisted overall with alignment across the research problem, literature review, research methodology and method of analysis.

It is central once more to point out that qualifiers were considered prior to the interviews being completed by the researcher. The purpose of these were to drive a focussed selection of MNE and manager as outlined in Chapter 4. These included the organisation of interest being an MNE, the participant from the MNE being a middle-level manager or up, and lastly whether the participant had direct experience of strategy implementation tools and practices.

5.2 Sample description

The selected sample across eight companies and their seven related industries/sectors was obtained through a mixed method of sampling in the form of purposive and snowball sampling. The researcher made use of their personal global network, yet the snowball sampling seemed to have been less effective outside South Africa.

The researcher was physically only present in South Africa during all completed interviews. This was considered as not having had any impact on the richness of the study as all interviews were conducted via Zoom which is a web conferencing platform further supporting a COVID safe approach. Table 4 below indicates a summary of the chosen individuals which form the sample – their current position and the industry/sector their company works in. Furthermore, the sample group consisted of four South African headquartered MNEs with operations in South Africa, two American headquartered

MNEs with operations in Italy and the United Kingdom, one Australian headquartered MNE with operations in the same country and lastly one New Zealand headquartered MNE with operations in the same country. Participants across the seven industries as listed allowed for the possibility of recognising key themes across the sectors.

Table 4: Summary of Chosen Sample.

Industry/ Sector	Co.	MNE HQ	Sphere of Operations	Respondent Position	No. of Respondents
Financial Services	A	South Africa	South Africa	Head of Marketing	1
			South Africa	Head of Product Development	1
Management Consulting	B	South Africa	South Africa	Founder - Chairman	1
			South Africa	Chief Financial Officer	1
Marketing & Advertising	C	South Africa	South Africa	Behavioural Linguist	1
			South Africa	Behavioural Insights	1
Retail	D	South Africa	South Africa	Head of Online	1
			South Africa	National Planning Manager	1
	E	Australia	Australia	Head of Strategy Execution	1
Foods &Beverages	F	USA	Italy	Marketing Director	1
Package/Freight Delivery	G	New Zealand	New Zealand	Leader of Change Management	1
Real Estate	H	USA	UK	Portfolio Director	1
				TOTAL =	12

Note: Co. refers to company, MNE refers to multinational enterprise, HQ refers to headquarter and No. refers to number.

Table 5 below indicates the details of the interviews as conducted through Zoom video call interaction that lasted from 22 to 49 minutes per interview. Only two interviewees

were not visible during the recording, despite the preference setting when Zoom meetings were scheduled. One had experienced a roadside assistance incident whilst the other had struggles with connectivity. For the balance on interviews, the researcher had the benefit of interpreting body language and facial gestures. All participants agreed to having their interview sessions recorded as prompted by the researcher, the signed and dated informed consent letter, as well as the prompt on their side from Zoom.

Table 5: Interview Details.

Description	Measure (as specified)
Total number of interviews	12 units
Shortest interview length	22:29 minutes
Longest interview length	49:42 minutes
Average interview length	32:02 minutes
Total length of interviews	384:33 minutes

The subsequent audio recordings only were shared for individual transcription by a specialised transcriber. Once the identifiers had been removed, the transcriptions were added onto the ATLAS.ti 9 workbench to enable qualitative scrutiny through frequency and thematic analysis.

5.3 Presentation of results

The results from the qualitative data as gathered from the completed interviews is laid out according to the three individual RQs as detailed in Chapter 3 including their related ISQ (see Appendix 3). Linked to each ISQ, a frequency table was completed indicating themes, code groups and frequency. The decision was made to only include those themes with a frequency of three and more. Furthermore, only the top two themes per ISQ were then further unpacked and the main reason for this decision was merely due to the size of the data and to ensure a focussed study. An all-inclusive coding manager (see Appendix 5) is included to indicate the researcher's detailed work.

The intention of the research study was to overtly contrast and compare across industry, MNE headquarters and spheres of operations. To further support confidentiality and in line with the research ethics code, it is important to note that the company reference of A to H (refer Table 4) does not indicate the chronological order of the completed interviews, neither does the clustering of respondents per company.

5.3.1 Results of Research Question 1

Research Question 1: What organisational conditions are needed for effective strategy implementation?

The three ISQs that were enlisted as part of the first RQ were intended to gain interviewees' understanding of the extent to which strategy formulation and implementation was viewed as a structured process within their organisation, in which way externalities were taken into account within this process and how, despite their impact, responsiveness was built into the strategy formulation and implementation cycle to prop continuous innovation. The purpose was ff course to answer the first RQ. In totality, the data from RQ 1 produced 65 codes placed into 23 code groups.

As per the notes to the interviewer (see Appendix 3), externalities referred to current and predicted future events of a socio-political, economic, environmental or technological nature.

ISQ 1.1: Extent to which strategy formulation and implementation is viewed as a structured process.

Table 6: Frequency Table Linked to ISQ 1.1.

Themes	Frequency
Specific processes and steps	17
Periodic reviews	8
Size enables nimbleness	5
Customer centric	5
Strategy formulation within business units	4
Key guiding principles	3
North star focussed	3
Balance of structure	3
At the core of everything	3

From the data it is evident that the leading theme was 'specific processes and steps' followed by 'periodic reviews'. Coincidentally, they both fall into the 'more structured' code group.

The following quotes relate directly to the theme **specific processes and steps**:

"…some of the goal setting exercises that we've started doing now as a company really do feed into the strategy of then the clients that we're looking for, the type of work we're trying to do. As an example, we wanted to do behavioural communication work across every sort of industry or vertical within a South African context, and that was one of the goals we set a good year and a half ago. And as a result of that goal setting, I think it has definitely fed into the strategic stuff that we now look to do. So, we will actively go out and do business development for clients in different industries."

- Interview 3 (Respondent C 1)

"So, it's like a continuum. You start with your strategic intent, you move along to a certain point and then there's the handover point to the execution teams or the project or program managers to execute on that."

- Interview 4 (Respondent E 1)

"And then that would then shift through to the different areas to try and understand how to achieve those strategic objectives. So the area that I'm in from a research and product development perspective we get a very clear understanding of what are the strategic requirements, whether it's of (Company A Bank) or whether it's of (Programme A). And then when we're thinking through from a product development perspective it would be how are we going to try and achieve those strategic objectives. What are the strategic choices that we're making from a new product development perspective? Where's the focus, which projects are we prioritising, which projects are we not prioritising?"

- Interview 10 (Respondent A 2)

From an outcome point of view, there seems to be an opinion that a good starting point as part of the process is in actual fact looking at previous launches and initiatives that have been rolled out. According to respondents, some companies are very focused on ensuring that their goals feed into their strategy to ensure they become a reality. A seemingly popular view is that strategy formulation and implementation is viewed as a

continuum of elements within sequence of one another. Another prevalent finding was that the strategy framework generally comes from the top level down, but there are subsequent feedback sessions to the leadership team. Certain respondents report there being numerous iterations before roll-out occurs. One respondent makes a point of clearly prioritising where to focus or not.

The following quotes relate directly to the theme **periodic reviews**:

> *"Our financial year starts in July, we run from June to July – July to June rather, and then we have an annual launch cycle that kicks in September and then sometimes in March we sometimes have two sort of innovation or launch cycles. But we have an annual, I guess, strategy plan which goes from January to December, because I just think it's the natural way people align to."*
>
> *- Interview 1 (Respondent A 1)*

> *"So, our use of strategic planning and where it has become a discipline in our organisation, we have one annual strategic workshop with senior leadership in our business."*
>
> *- Interview 2 (Respondent B 1)*

> *"So, it is really at the base of everything. It is a structured process, it comes with specific let's say milestones and, as I said, a thought process. We are working with the department, an entire department called (department 1) I said, that are feeding us the relevant insights and things. And we are very much a consumer-centric company, so we talk to consumers. We need to know what they are thinking, how their needs have been evolving over the years, what their mind is, what is their perception of us, and so on and so forth so we can get as general or as granular as you want it to be."*
>
> *- Interview 6 (Respondent F 1)*

From an outcome point of view there seems to be a common thread of respondents perceiving their strategy formulation and implementation as a yearly process with specific milestones and is generally dependant on when the financial year starts and ends. Some do take it a step further and have a longer term five-year view. There is also mention of particular companies having a half-year review or a standstill of sorts relating to how they

are tracking against the strategy. Dependant on company size, some respondents remark on companies having dedicated departments that feed them relevant insights into the above-mentioned process. Some view proximity to the customer as fundamental as there needs to be an understanding of how factors are evolving.

ISQ 1.2: Taking externalities into account within the strategy formulation and implementation process.

Table 7: Frequency Table Linked to ISQ 1.2.

Themes	Frequency
Pivot to remain relevant	7
Adaptation to trends	7
Specific examples	5
Full view ecosystem	5
External research	3
Specialist speakers	3
Macro factors	3

From the data, it is evident that the leading theme was 'pivot to remain relevant' followed by 'adaptation to trends'. They fall into the 'continuous adaptation to externalities' and 'trend analysis' code group respectively.

The following quotes relate directly to the theme **pivot to remain relevant**:

> *"I suppose that's quite a big one. We are fortunate enough to be a small business, I mean there's pros and cons of course always, but luckily because we are a small business, we're able to be quite adaptable and flexible and we are probably less affected by some of these external factors as a big corporate would be. So, we're able to adjust to things and move quite quickly and change direction and be flexible, whereas turning a big ship like a (Company 12) or an (Company 13) is sometimes a lot more difficult and slower."*

> *- Interview 9 (Respondent C 2)*

> *"We're currently busy with a complete transformation in the organisation and I'm part of that, which involves operating model change, which is actually a very deep*

transformation that talks about reformation of the organisation. Moving from post – so you will understand currently or it started more than 100 years ago on mail, and now it is – there's a discontinued change, meaning we need to stop the old and move into a commercial focus around e-commerce, more courier business, parcels, international. And it asks for a different technology, a different process, different operational process in totality."

- Interview 11 (Respondent G 1)

"Ja, that is essentially what drives our business, or ultimately the success is our reaction to the externalities, being able to contextualise that, to create a narrative around it and frame our product specifically within what's happening in the market. We're bound to the market, we've done, as I said, long-term deals and we have to be able to understand the market can sometimes fall away, which in the UK has never happened before. So, it's been interesting. It's been wild."

- Interview 12 (Respondent H 1)

From an analysis point of view, the perception of some respondents is that their clients have been good at finding ways to pivot in line with the pandemic setting which in turn was good for them. A key point of view was how to remain significant in the individual's mind whilst adopting to the macro environmental factors. There was a view shared of how fortunate it is to be a small business in the sense that, in comparison to some of the big corporates, there is an added ease to their adaptability and flexibility. A key insight shared by respondents is that the adaptation to externalities is not necessarily a long-term view but rather one of survival. Lastly, some compare the pivot to needing to stop the old before moving into the new.

The following quotes relate directly to the theme **adaptation to trends**:

"And of course, with cloud technology and where we're going that could also – that is also a reality that we could do and we have been able to do. So, we run the whole East Africa client operation from here, and we could run it from Malta, or anywhere for that reason."

- Interview 2 (Respondent B 1)

"There's a lot of work on trends and trend spotting and all that good stuff, particularly in things like food. So, it's not even about retail, it's even about food products, what is the latest in (meat product), is it a (meat product A), a (meat product B)? And here we are, we've just launched a (meat product B). So ja, there's a lot of work that's done on trends, on trying to spot trends, be it food or fashion, economic trends, etc. etc. that we all use to distil to bake into our strategy."

- Interview 5 (Respondent D 1)

"Others would be – the externalities would impact different trends that we're seeing, but that would then inform the strategic objectives. Like examples in the (Programme A) space, when you start thinking through externalities, it's the way that individuals are engaging with physical activity that over the past five to eight years increased, a far greater proportion of individuals have got wearable devices which makes it a lot easier to track and measure individual's engagement and physical activity. And then to offer them behavioural incentives off that."

- Interview 10 (Respondent A 2)

From an outcome point of view respondents share that with the rapid shift in technology anything previously thought of as impossible is likely possible and there is an essential need to stay up to date with advancements. It is common for respondents to work through external information in an attempt to stay current but even this needs to be limited. Some respondents share that there is a major focus on trends and trend spotting within their environment and ultimately this feeds back into the strategy which informs the strategic objectives. Some take it a step further and actively encourage a behavior shift through incentives.

ISQ 1.3: Building responsiveness into the strategy formulation and implementation cycle.

Table 8: Frequency Table Linked to ISQ 1.3.

Themes	Frequency
Experimenting within a live environment	6
Innovation drive	5
New product/ packaging enhancements	5
Reactive approach	4
Proximity to change	3
Clear strategy journey	3
World of agile	3
Agility	3
Natural innovation focus	3
Senior management involvement	3
Business readiness to respond	3

From the data, it is evident that the leading theme was 'experimenting within a live environment' followed by 'innovation drive'. They fall into the 'experimenting with concepts' and 'fuelling innovation' code group respectively.

The following quotes relate directly to the theme **experimenting within a live environment**:

> *"But how do you marry that with doing shorter, sharper experiments to market? And that is always the complexity, is sometimes when there's a lot of competitor activity you might feel biased to kneejerk and only do short, sharp experiments across a myriad of themes, but actually you've got to also kind of try and keep calm and really understand the impact of doing that on the long term."*

> *- Interview 5 (Respondent D 1)*

"So again, a minimal viable product to the market quickly, get customer feedback quickly, you might make some failures along the way but iterate, iterate, iterate. So, at the end of the two-year period, you're far further ahead in terms of having launched a project, iterated it, got customer feedback and then adapted it to what they really want than you would have had in a waterfall approach. So that's why we go into extreme rigour in how we work in agile."

- Interview 5 (Respondent D 1)

"It does mean a culture change, a culture where we talk about failing fast, but what does that really mean? It's not easy to change a culture, no-one wants to fail. Especially in a company like ours where we love perfection, it's quite a big culture shift."

- Interview 5 (Respondent D 1)

From an outcome point of view, firstly, the researcher highlights that the view expressed above is from a single respondent. According to respondent D 1, the very first thing that is required is a change in culture – a shift from perfection to failing fast. The respondent does acknowledge the level of difficulty that lies within this shift. It is the perception of respondent D 1 that this shift in execution enables a quicker arrival to market of a minimum viable product with greater efficiency around the customer feedback loop. Iteration is key throughout the process.

The following quotes relate directly to the theme **innovation drive:**

"We have launched some flavours in our plant beverage category because again we have launched this category in 2018 seeing the good trends on …[indistinct] milk and all of these things. So, we are continuously innovating in this category because we know there are certain trends going on, so we have launched two flavours of this kind under our brand called (Brand 1), that is the plant-based beverage for us."

- Interview 6 (Respondent F 1)

"That's it. So, I am all for innovation but maybe what I'm just saying is that innovation should be sensible. You shouldn't just run with what your competitors doing. You need to look into your internal environment and you need to look at

what you have, and then you need to make a hard decision to say, 'Yes, we want to be innovative but we cannot copy what the other guys are doing directly, we need to come up with something that suits our…' – ja, so that's been my type of frustration when it comes to things like that. So sensible innovation, I think that's the best answer."

- Interview 8 (Respondent D 2)

"And so, I think it's been certainly the last 18 months keep your head above water, fight for survival and make sure that we continue to drive towards the north star I mentioned earlier. For us, which is profitability and obviously going public, I think essentially – what do they say, necessity is the mother of all invention or something, so driver of all innovation. And for us that's absolutely been the case. We've had to strip our team's mid-way through a sales cycle, restack teams, reorganise people, relook at every single piece of the business in order to just keep afloat."

- Interview 12 (Respondent H 1)

From an outcome point of view, respondents have shared that continuously innovation is enabled through an awareness of ongoing trends as well as the insistence of it being prevalent by the company itself. There is also a different view that this has changed considerably within the past 18 months – innovation now being more a result driven by reaction. It is a participant's opinion that the new normal is a fight for survival as the drive continues towards the north star. In addition, there is an added perspective to innovation with the focus on sensibility – it's not all about competitors but also taking stock of what the individual company has.

Conclusion for RQ 1 results

A good starting point to effective strategy formulation and implementation is looking back at previous launches and initiatives. Goals are fed into strategy to ensure that they become a reality and clearly prioritise the focus. Strategy formulation and implementation can be viewed as a continuum with the framework generally coming from the top. There are numerous iterations before roll-out with feedback sessions back into the leadership team. There is general consensus that strategy formulation and implementation is a yearly process with specific milestones. Some have a longer five-year view, too. Strategy is also repeatedly reviewed to ensure the results are tracked. Dependant on company

size, some have dedicated departments that deal with insights and that support formulation. Of great importance is the proximity to your customer and understanding how matters are evolving.

Externalities have affected all companies and their clients and, in severe instances, what is important is to survive. Finding a way to pivot has been fundamental – key to this was remaining significant and adopting to the environmental factors. Of great importance is stopping the old before moving onto the new. Small businesses claim to have had it easier owing to their adaptability and flexibility. The rapid shift in technology has made everything possible if one stays up to date with enhancements. Some look at external information to stay current but a balance is required. There is a major focus on trends and trend spotting which feeds into the strategy and subsequent objectives.

Around responsiveness, there is singular view that a culture change towards failing fast enables quicker arrival to market of a minimal viable product. Iteration is key, resulting in greater efficiency around the customer feedback loop. Continuous innovation is linked to an awareness of ongoing trends and is more prevalent in companies that insist on it. Innovation has changed in the last period and is now driven by reaction – the new normal is a fight for survival. An added perspective is that innovation must be sensible.

5.3.2 Results of Research Question 2

Research Question 2: What is the role of managerial agency in effective strategy execution?

The four ISQs that were formed as part of the second RQ intended to gain interviewees' understanding of the extent to which they influence strategy formulation, the level of operational discretion they are given to translate the strategy into executable components, the company's resilience rating in regards to strategy formulation and implementation chain linked to unforeseen external events and the extent to which managers impact this level of strategic resilience. The purpose was of course to answer the second RQ. In totality, the data from RQ 2 produced 55 codes placed into 21 code groups.

As per the notes to the interviewer (see Appendix 3) and with reference to the rating pertaining to ISQ 2.3, 1 indicated low resilience and 5 indicated very high resilience. Furthermore, strategic resilience referred to flexibility and adaptability.

ISQ 2.1: Extent to which managers influence strategy formulation.

Table 9: Frequency Table Linked to ISQ 2.1.

Themes	Frequency
Filtering of information	6
Bottom-up approach	5
Collaborative leadership	4
Consultative style	3
Open communication channel is key	3
Central level decision making	3
Business size/ structure dependant	3

From the data, it is evident that the leading theme was 'filtering of information' followed by 'bottom-up approach'. They fall into the 'alignment to needs' and 'management approach' code group respectively.

The following quotes relate directly to the theme **filtering of information**:

> *"From there that also sort of filters down through the organisation of managers ensuring that strategies are kept up to date and that we deliver on what we set out."*

> *- Interview 1 (Respondent A 1)*

> *"For myself I deal with this country, so I really need to make sure that the strategy that is being proposed is fit for it, or I have for instance different insights. Because Italy is the most aging population so I need to take care of the adults in that sense, for instance. So, there is a permanent discussion between myself and the group as we call it, to make sure that the strategy fits the needs."*

> *- Interview 6 (Respondent F 1)*

> *"These guys talk to those clients, when the clients start talking about changes that they notice, or wow, we can't get our products out of whatever country because there's a shortage of chips, or whatever the case is you know, then they talk to those people first and those people can come to us. The managers can*

come to us and say, hey guys, we've got a problem with client X, Y, Z. So ja, it's certainly valued input from management side."

From an analysis point of view, there is a perspective that strategy filters down into the organisation through the managers with the main aim of keeping it up to date and ensuring what was set out to be achieved is completed. Some participants deal on a country level, so it is paramount to ensure the strategy is fit for purpose with insights provided. This 'fit for purpose' discussion is a continuous one and also includes other parties with direct interests. This tapers down into the support structure who would then ensure the scope is aligned to, for example, their category. Another view is that opportunities are identified in this manner when information is filtered up to the next level with the view of solving the specific dilemma.

The following quotes relate directly to the theme **bottom-up approach**:

"I guess it's a fine balance of being able to really get that right. But certainly, I think if you want people to buy into whatever it is that your business does, they have to feel invested and they have to feel like they're being heard and that their voice counts, and if it doesn't count then you've got the wrong people."

- Interview 3 (Respondent C 1)

"We create a strategy, a huge amount. So, we are responsible for creating the strategy, it's not something that's done only at Exco level. We are presenting it to Exco for their discussion and ratification."

- Interview 5 (Respondent D 1)

"So, the bottom-up process. So, when we speak managers here, they speak about level 2, 3, 4, I don't know how you refer to it, but typically in your world your W1, W2 managers would be very involved in – so your level 3 managers, business leader level, would be very involved in strategy setting. So, in that sense I think it's slightly decentralised and it takes place in quite a silo 'ed way."

- Interview 11 (Respondent G 1)

From an outcome point of view there was an insight of how important it is to make individuals feel heard and invested; and how this links back to individuals then buying into what the specific company does. This is portrayed as not an easy balance to get right. Other participants have shared that strategy is developed on their level solely but that it does feedback into exco for discussion and sign-off. Another view was that the extent of influence was dependant on the level of manager – higher levels focussed on strategy formulation versus lower levels focussed on strategy setting. This specific way is viewed is being decentralised and siloed. In addition, some participants have shared that their companies have quarterly strategic reviews where strategy formulation is further influenced. There is more than one participant that questions the level of success of working with a 'bottom-up' engagement channel.

ISQ 2.2: Level of operational discretion given to translate strategy into executable components.

Table 10: Frequency Table Linked to ISQ 2.2.

Themes	Frequency
Balanced autonomy	8
Consultative/collaborative approach	7
Dependant factors	6
Driving consistency	3
Expectation based on experience	3
Freedom of space	3
Struggle for autonomy	3

From the data, it is evident that the leading theme was 'balanced autonomy' followed by 'consultative/collaborative approach'. They fall into the 'levels of autonomy' and 'collective approach' code group respectively.

The following quotes relate directly to the theme **balanced autonomy**:

> *"I'm a bit of a control freak, to be honest, so I think I would find it a little bit – if I had mapped out the strategy and we'd all discussed it and decided on it and then for whatever reason it wasn't being followed or people took it upon themselves to follow a different one I would really want to know why and there would have to be some sort of explanation for that that makes sense."*

"…he empowers his people but he checks in with them regularly on a one-on-one basis and asks them to give updates on how they're going. He challenges hurdles, risks, issues, structures in that manner, but he would prefer his people to make decisions and if in doubt just ask for his guidance, what he thinks."

"And I think it's a balancing act from the execs, that's got to be an incredibly challenging place to be. You need to keep control of a business, you can't let it run wild, and everybody to make their own decisions. You have to create the systems and the platforms that allow people to do that, but do it within the broader parameters that you put down."

From an outcome point of view, there was an insight shared around if there was a decision taken not to follow the strategy or follow a dissimilar one, there would need to be an explanation, taking into consideration that it had already been discussed and decided on. Another participant gave a perception of his direct line who empowers them through regular check-ins and updates. This specific individual would prefer decisions to be made by his people but is available for guidance upon request. There was also a view shared that because most executable components entail funding, there is greater control to ensure alignment to the overall business strategy. Furthermore, this type of alignment is highly encouraged as the specific business is highly cross-functional. Another participant shared that there is no set order of steps to be followed but that they encourage regular meetings to ensure everyone is aligned. Lastly, there is a perception that executives find themselves in a very challenging place having to balance all aspects – keeping control whilst still encouraging own decision making. This is achieved by placing broader parameters into place.

The following quotes relate directly to the theme **consultative/ collaborative approach**:

"But I do definitely see strategy within my own business as being a top-down approach initially, and then more collaborative I guess when we start unpacking the detail. But I like to think that I've got the vision for where I want my business

to be and what I want it to do and the types of clients we want to have, hopefully that message is clear to everyone else. And then the collaborative process I guess would come with some of the detail of how we get it too there. But without sounding like a complete dictator."

<div align="right">

- Interview 3 (Respondent C 1)

</div>

"And you can follow a route where you say, well I don't care what you do, just get to that outcome. That's not what we do. But guys, what do you think? You drive the business, you know your team, you know your clients, that's the outcome we want, go for it. And there's guidance and there's involvement and there's meetings and discussions around that process to get to the outcome."

<div align="right">

- Interview 7 (Respondent B 2)

</div>

"So there obviously needs to be some level of governance, I mean it's lovely to be collaborative and to get everyone's inputs, but at some point, key decision making and particularly financial decision making needs to be controlled at some level. So, although everyone has a level of freedom to allow people to work where they want, how they want, with the right client and the right projects, the execution of decision making is still sitting at a founder level."

<div align="right">

- Interview 9 (Respondent C 2)

</div>

From an outcome point of view, respondents share that the discretion allows individuals to feel part of the process and ensures a level of ownership as well as pride. Some respondents believe there should be no place where this consultative and collaborative process does not take place. The collaborative piece starts when the strategy detail is unpacked – the 'how we get there'. Another insight is that it is not just a case of reaching the outcome; the team needs to be involved as they have additional insights into their team, the business and clients. From there on, there are levels of involvement and guidance to get to the outcome. Another view is that a level of governance is fundamental, especially around financial decisions and although there is a level of freedom, the execution and decision making is at a higher level. The structure composition also plays a role – as an example a flatter structure would encourage a more collaborative team.

ISQ 2.3: Resilience rating of strategy formulation and implementation chain to unforeseen events.

Table 11: Frequency Table Linked to ISQ 2.3.

Themes	Frequency
Adaptation to COVID	10
Quick adaptation	7
General awareness of environment	5
Change in approach	4
Importance of reinvention	3
Focus on the new need	3

From the data, it is evident that the leading theme was 'adaptation to COVID' followed by 'quick adaptation. They fall into the 'resilience in a VUCA world' and 'resilience and adaptation' code group respectively.

The following quotes relate directly to the theme **adaptation to COVID**:

> *"Australia has a higher online portion and some of the businesses, for instance (Group 2) has a dedicated distribution facility for online and it had the potential to expand so they weren't impacted as badly. (Company 6) had a distributed number of DC's so it was really coordinating that increased volume across all those DC's which was a bit problematic, but they got there quicker. So, from a resilience perspective we're right in the middle."*

> *- Interview 4 (Respondent E 1)*

> *"…and then there's also the Covid example where during Covid a certain portion of our business just disappeared, there was just no travel. So, the travel incentive side of our business just completely died down and millions and millions of Rands of potential revenue was just swept off the table within a couple of weeks. That*

was a year ago, 18 months ago, here we are, we're carrying on. We came up with other ideas to engage with our travel clients, instead of offering a travel trip we offered something else."

"…and the business itself is able to almost like within a month completely pivot, change everything, relook at everything and change its entire strategy and roll that out across a global business in next to no time. We've just done it in the middle of a pandemic, launched numerous new products that we didn't have prior, built entire IT infrastructure, background infrastructure that we needed for people to be able to utilise our portfolio almost overnight, and save the business."

From an outcome point of view, respondents substantiated their ratings by sharing that many companies within their industry had just not survived, and the focus initially was purely to save the businesses. All respondents had turned the situation around to various degrees and it would seem that key to this was keeping client's content, remaining relevant with various other ideas and refining or re-designing the existing strategy. A view was shared that it was not just the normal day-to-day work anymore with extreme elements of adaptation to the unusual. There was an insight shared that what the pandemic had done well was expose weaknesses impacting on the capacity to scale and change. A common finding was that the bigger the business, the slower the wheels turned. A respondent commented that their level of adaptation was affected by what was already in place – the stronger the existing presence of an element, the easier the adaptation. There was a view that COVID had thrown everything into disarray and all aspects of the business and the consumer needed to be re-assessed, for example where individuals are spending versus not spending.

The following quotes relate directly to the theme **quick adaptation**:

"Where there have been aspects where we've grappled a bit, like in fulfilment in online. We're a cold chain, we have all sorts of things that we had to go into manufacture, we didn't have our capacity available as fast as our competitors. At the same token look at how the stores have adapted. By the way, that's not because we just didn't do anything, it's because we had to go and manufacture cold chain equipment during lockdown level 1 or 5, you know what I mean?"

"And we were – even us personally we were sent home, our office has been closed since February 2020, so we are still as you may see me, I'm from home, so the office is still closed. We were sent home and had to pick up the pace of the digital environment, we had to operate our plants, we had to manage the sales people, we had to make sure that we at least keep our at home channel very much into play. So, it was a very big change and I would say that we adjusted very, very rapidly and with great quality in that sense. We learnt a lot, that's why it's not a five, because being such a big company you are sometimes like an elephant, so you don't move very fast."

- Interview 6 (Respondent F 1)

"So, they speak about peak periods, we've had an extended period because the moment we went into lockdown people transitioned all their behaviour into online shopping, and online shopping in New Zealand maybe as a context what you need to understand is big. Very effective, very efficient, you can order anything online from all over the world, it gets delivered to your door. You don't have to sign for anything, you don't have to go to the post office and stand in long queues to collect your parcel, it gets delivered to your door, done. Within a day, two or three. So, it's very easy to have very good online shopping going on, so our business – I mean volumes has got – they're operating at 300% of their normal volume, things like that. Or double their volume and up to 300% of their normal volumes and still coping."

- Interview 11 (Respondent G 1)

From an outcome point of view, respondents have shared that here have been aspects to the adaptation that they have found specifically difficult – especially those that required action during deep lockdown or action that was required based on the President's address effective for the following day. It would seem that in the bigger scheme of things, companies adapted well, taking into account the level of complexity. There are even insights that those who had to adopt working from home had to learn very quickly to manage all aspects of their business remotely. There was an immense learning curve that took place and once more it was mentioned that bigger environments can move slower at times. A view shared was that the resilience had existed prior to COVID as it

was quite normal to adjust, for example to new competition within the market. One respondent commented on the view that ensuring your product offering is still relevant under the pandemic was highly relevant. Once more a view was shared that quick adaptation is linked to what was already in place.

Table 12: Resilience Rating for Company A to F.

Company	MNE HQ	Sphere of Operations	Respondent	Rating (1 – 5)
A	South Africa	South Africa	A 1	5
		South Africa	A 2	5
B	South Africa	South Africa	B 1	4
		South Africa	B 2	4
C	South Africa	South Africa	C 1	3.5 to 4
		South Africa	C 2	4
D	South Africa	South Africa	D 1	4
		South Africa	D 2	3
E	Australia	Australia	E 1	3
F	USA	Italy	F 1	3.5 to 4
G	New Zealand	New Zealand	G 1	3.5 to 4
H	USA	UK	H 1	6

Note: MNE refers to multinational enterprise and HQ refers to headquarter.

From the data, an observation is that it would seem the South African based MNEs on average rated their organisations' resilience slightly higher than the rest. Respondent H 1 is the anomaly to the ratings as the rating given falls outside the provided parameter, yet the point is made. It would also seem that where there was more than one respondent per company, the scores were relatively close to each other – no difference greater than one.

ISQ 2.4: Extent to which managers impact strategic resilience.

Table 13: Frequency Table Linked to ISQ 2.4.

Themes	Frequency
Supported by visible leadership	8
Flexibility and adaptability	6
Deep routed values	3
Popular views	3
Reflect and pivot	3

From the data, it is evident that the leading theme was 'supported by visible leadership' followed by 'flexibility and adaptability'. Coincidentally, they both fall into the 'embracing new normal' code group.

The following quotes relate directly to the theme **supported by visible leadership**:

"Ja, and something that's quite controversial, hotly debated, but really just getting the leaders on-board. And I think (the CEO of Company A) just – the questions being able to answer but really asking for this kind of leadership where we can take a stand and really lead from the front. So, I think that is encouraged, it's throughout my career I've seen it, it's just how important taking that strong leadership role is. So ja, it's a big part of who we are and I think all managers are encouraged to lead that way."

- Interview 1 (Respondent A 1)

"I think in times of, do you call it chaos, or times of challenges which you don't see coming it's all about leadership. So, you can either confront it in two ways, put your face in your hands and close your eyes and hope for the best, or you lead from the front."

- Interview 4 (Respondent E 1)

"So, I think based on the structure of the business and the ability for me to put a meeting in with the head of global sales and get some time with him, have a discussion about what's happening to me on the ground, him to take whatever my feedback is seriously, to bring that up at the next exco meeting and for

something to actually happen off the back of that I think has been key and is probably what has driven the business forward."

From an outcome point of view, there were insights shared that the role of leadership is very much a culture that filters down through the levels of management – it cannot just come from the top. Where this is truly visible is around the big, sometimes controversial decisions being made but backing it with visible leadership. Another respondent indicated that it is within chaotic times or times of challenges that leadership truly comes to the fore. There was an additional view that there is an expectation of managers to lead the strategic resilience – being open to change and above all resilient. Some respondents suggested that strategic resilience can only be effective with buy-in across all levels. Lastly, a perception exists that leaderships' willingness to engage around matters of importance is what has driven the business forward.

The following quotes relate directly to the theme **flexibility and adaptability**:

"I mean absolutely the managers are not separate to the organisation, the managers are the organisation. So, for me to say we're resilient it means managers and staff are resilient, they're not two separate things. It's not an entity which is a physical structure and then people, it's all the same thing right? So ja, those who succeed and thrive and flourish are those who are absolutely flexible and adaptable to change, there's no doubt about it."

"I think that that is similar to what we've just discussed because, as I said, we use this sort of gig economy and a lot of freelancers and a lot of consultants feeding into the company. They are all familiar with the small business mentality and how things go about and how it's dynamic and flexible and adaptable. And so, I think this resilience is just part and parcel of the model of the business."

"I think it's very difficult to – it goes hand in hand with your previous question and I think that if the managers didn't buy-in, if they weren't able to react, if they didn't

have the freedom, if they didn't have the ability to adjust the approaches then you would have issues again."

- Interview 10 (Respondent A 2)

From an outcome point of view, some are of the opinion that those who flourish and thrive are those most flexible and adaptable to change. Some have indicated that there has been a clear shift from coping with change to driving change and getting comfortable with the unknown. Certain individuals believe that the small business model speaks to a specific mentality of being dynamic, flexible and adaptable. The same respondent shares how they previously felt within a more corporate environment – not as empowered or part of the strategy in comparison. Within a smaller environment, the strategy is less likely to change as individuals are able to react and change things more effectively.

Conclusion for RQ 2 results

Strategy filters down into the organisation through managers ensuring its kept dated and achievement is tracked. Strategy needs to be fit for purpose at all times which further translates into a continuous discussion with all relevant parties. This tapers down into the support structures ensuring the scope remains aligned. At times, information is filtered up with the view of solving a specific concern. It is important for individuals to feel heard and invested in, which in turn allows buy-in into the company. This is by no means an easy balance to achieve. Strategy is generally fed back into exco for discussion and sign-off; and the extent of influence on strategy formulation is dependent on level. Some companies have quarterly strategic reviews where strategy formulation is influenced. There seems to be many question marks around the success of working with a 'bottom-up' engagement channel.

From an operational discretion point of view, it would seem that if a strategy is not followed there would need to be some sort of explanation especially if it had already been engaged on. Some managers empower through regular check-ins and updates – they prefer own decision making but are there guidance. Most executable components entail funding which supports greater control and alignment to the overall business strategy. This becomes more important when the business is highly cross-functional. Regular meetings are encouraged to ensure alignment across. Executives find themselves in a challenging position – keeping control whilst encouraging autonomy. The only way around this is placing broader parameters in place. Operational discretion allows a feeling of partnership, ownership and pride. There is a strong sense that the

consultative and collaborative process should be present everywhere. Collaboration starts then the strategy detail is unpacked. It is not just a case of reaching the outcome as the team involvement provides additional insights. A level of governance is important especially around financial decisions. There is a general level of freedom and execution and decision making is at a higher level. Structure does play a role – the flatter encourages increased collaboration.

With reference to rating resilience, respondents substantiated their rankings by indicating that many within their industry had simply not survived and the initial focus was just one of survival. Most have turned the situation around to various degrees and key to this was remaining relevant in the client's eye as well as refining the existing strategy. It was not just the normal day-to-day work anymore and, in addition, the pandemic had exposed weaknesses. The bigger businesses took longer to turn the wheels of change. The level of adaptation was affected by what was already in place. COVID had thrown everything into disarray and all aspects of the business had to be re-assessed. Some aspects of the adaptation have been specifically difficult, especially those during deep lockdown or linked to lockdown level adjustments. Companies have adopted well taking the complexity into account. Even those working from home have had to learn fast and manage their normal duties remotely. There was an enormous learning curve and bigger environments took longer to adjust. There was a view that resilience existed prior to COVID and key to getting through the pandemic was ensuring the product was still relevant. Quick adaptation was linked to what is already in place.

South African based MNEs were on average rated higher on their resilience in comparison to the rest. It is also evident that in instances of the sample having more than one respondent, the difference in rating was never greater than one.

The role of leadership when engaging strategic resilience is a culture that filters down the levels. It is most visible when controversial decisions are made backed through visible leadership. Furthermore, leadership comes to the fore during chaotic time or times of challenges. Managers are expected to lead strategic resilience and need to be open to change. Effectiveness requires buy-in across all levels. A willingness to engage on important matters will drive the business forward. Those who flourish and thrive are most flexible and adoptable to change. There has been a shift from coping with change to driving change – getting comfortable with the unknown. The small business model displays a specific mentality of being dynamic, flexible and adaptable. From experience, there is an indication that there is less empowerment within a corporate environment.

Smaller environments react and change things more effectively therefore strategy is less likely to shift.

5.3.3 Results of Research Question 3

Research Question 3: How do organisations deliberately integrate (1) and (2) to achieve strategic competitive advantage?

The three ISQs that were formed as part of the third RQ were intended to gain interviewees' insights into the tools and practices that are commonly applied to the process of strategy implementation, how ongoing monitoring takes place to ensure these are effectively used and how the information derived from monitoring is retained and reviewed. The purpose was of course to answer the third RQ. In totality, the data from RQ 3 produced 56 codes placed into 17 code groups.

As per the notes to the interviewer (see Appendix 3), tools would typically be formalised/ codified processes and practices are frequently informal behaviours.

ISQ 3.1: Tools and practices commonly applied to strategy implementation.

Table 14: Frequency Table Linked to ISQ 3.1.

Themes	Frequency
Effective execution and project management	9
Various reviews	9
Performance management	6
Collaborative teamwork	4
Approach to solving problems	3
Shared value creation	3
Short term focussed on COVID recovery	3

From the data, it is evident that the leading theme was 'effective execution and project management' followed by 'various reviews'. Coincidentally they both fall into the 'tools applied' code group.

The following quotes relate directly to the theme **effective execution and project management**:

"So, I mean tools that we'd use is a lot of meetings, a lot of things like stand-ups, and we've got a very agile process of working, so that plays a huge part in our organisation of this agile model of working."

- Interview 1 (Respondent A 1)

"As a culture we have been starting this movement again two years ago to try to instil in people a new way of thinking about things that has to do with experimentation as well as this therapy[?] process I was mentioning, that has to do with working much more in teams."

- Interview 6 (Respondent F 1)

"There's change management, the teams really go through all the lengths to make sure that we tick all the boxes with regards to implementation, etc. I might not have the term for the tools but there are those what I call tools in place that makes implementation effective, if I have to put it that way, or achievable."

- Interview 8 (Respondent D 2)

From an outcome point of view, there was an insight shared that some companies make use of the agile model of working which involves various meetings. Some common terminology referred to include stand-ups, sprints and huddles. A participant pointed out to their company having weekly project forum meetings where all projects get discussed – full understanding of the scope and alignment. Other participants mention the use of models such as business canvas within their environment. A view that was shared was that a particular company would build tools and processes to support certain layers of strategy. According to the participant from the same company, there has also been an effort made to support more experimentation in attempt to get individuals to think differently. There was mention of change management playing a major role in terms of strategy implementation. Projects are also perceived as a popular choice of tool and naturally the business case would precede the project. These are mentioned to be supporting continuous improvement.

The following quotes relate directly to the theme **various reviews**:

"So, in an ideal world I would certainly believe that having the practice of at least breakaway sessions where people are comfortable enough to chat and voice creative ideas potentially that they wouldn't have before."

- Interview 3 (Respondent C 1)

"Then they share it with their peers and they do all the cross-functional sharing of strategies to align all the different pieces. That sort of happens end of March into April."

- Interview 4 (Respondent E 1)

"And the mechanism is it would slot into the thread reviews and quarterly strategic reviews, so it becomes a part of the business planning process, and a part of the transformation offers an EPMO processes of review of project and initiative progress."

- Interview 11 (Respondent G 1)

From an outcome point of view, there was an insight shared that suggests that the less formal reviews such as break-away sessions are effective in drawing creative ideas from those that generally would not have contributed before. There is an acknowledgement that once things get back to a more normal state, these types of sessions are vital. Another respondent commented on the importance of regular check-ins to ensure alignment towards the vision.

Within a bigger environment, it seems to be quite a complex process – cross functional sharing of strategies to ensure the different components align, framing of financials linked to mid-term plans and endorsement at board level. Thereafter, there are regular check-ins and updates with the board – quarterly view of strategic activities and then a decision on whether something significant has changed that requires a pivot. A prevalent insight that was shared was around the importance of post-evaluation reviews in regards to project or initiatives which would delve into performance, what worked, what did not work and what could be beneficial for the future.

ISQ 3.2: Ongoing monitoring linked to effective usage of tools and practices.

Table 15: Frequency Table Linked to ISQ 3.2.

Themes	Frequency
Performance reviews	8
Business data analytics	4
Project tracking	4
Various frequency of meetings	3
Will become more complex with time	3

From the data, it is evident that the leading theme was 'performance reviews' followed by 'business data analytics'. They fall into the 'periods of interaction/review' and 'leveraging resources' code group respectively.

The following quotes relate directly to the theme **performance reviews**:

> "We've obviously also got six monthly targets that we're hitting from a – that are setup, so we monitor those once a month and make sure that those are tracking well. And then if we need to adjust the strategy accordingly to cater or if there's something else, we need to do."

> *- Interview 1 (Respondent A 1)*

> "…so, it's quarterly updates, generally quarterly updates. And again – so the structure there is quarterly updates so all your key strategic priorities you should be looking at how you're performing in scope, how you perform against timeline, how you're performing against budget. So that's more a formal quarterly based process."

> *- Interview 4 (Respondent E 1)*

> "And so, if we see, oh well, this isn't working or this isn't going well, we're able to pivot and go a different direction and get a different outcome. And so being so outcomes-based means that that performance metric is really our guiding star, our like true north for how we do things."

From an outcome point of view, a respondent commented that monitoring takes place on a regular basis through huddles or reports that feed back into exco. The main reason it would seem is to ensure alignment across the main strategies. In addition, there is monthly tracking of half-yearly targets and once more, if necessary, the strategy can be adjusted accordingly to cater for changes. Respondents shared that there are formal quarterly updates – assessing performance against scope, timelines and budget. There was an insight shared that a company was perceived as particularly outcomes-based – they start by micro-level performance management per project and regularly also review the company itself. That feedback loop becomes essential and supports quick adaptation. The performance metric becomes their north star and if outcomes are not reached, they pivot accordingly.

The following quotes relate directly to the theme **business data analytics**:

> *"…a big part in terms of that and in terms of our reporting back is - I mean we live and breathe data, so I think it's such a part of what we're all looking at all the time. Like daily, getting daily data updates, we're getting daily – we work very closely with, as I said, we've got a huge actuary team that filters in. So those numbers we are looking at all the time, so we know exactly what's shifting where, how and that plays a huge part into our feedback cycle."*

> *"So, there is a department that is producing the scorecards and everything, then of course based on the strategies we call out and we say where each country is this and so on, but there is this big, big theme taking care of this. We have also tools like Power BI, maybe in some other companies they are used, that gives a very good visualisation of – and with a click of the sales for instance for the entire Europe region, or the consumer perception for the entire region for the brand (Company F)."*

> *"…we are an absolutely data hungry business, I've never worked for a business that is so obsessed with data, which is amazing. Everything from desk utilisation*

all the way through to average revenue per member, cost per square foot, dedicated cost per square foot, shared cost per square foot. We use sales for – if it's not in sales force it doesn't exist. We use Tablo like you can't believe, Looker, like every single data platform that you can think about we're in it, and we drive everything by numbers. You almost have to be a mathematician to work here, because it is everything is so numbers driven, numbers driven, numbers driven, and it's not just in the sales organisation, it's across every single organisation."

- Interview 12 (Respondent H 1)

From an outcome point of view, a perception was shared that data forms a massive part of reporting back which includes daily updates highlighting shifts which then informs the feedback cycle. Another insight was shared that they have a considerable amount of data that feeds back into company scorecards which are dependent on strategy call-outs. This same company uses tools such as Power BI to efficiently depict a visualisation of the data. Lastly, it is an experience of a respondent that their company is obsessive with the amount of data they use. In addition to this data use they also use various data platforms and everything is driven by numbers. This is the case across the entire organisation.

ISQ 3.3: Information derived from monitoring retained and reviewed.

Table 16: Frequency Table Linked to ISQ 3.3.

Themes	Frequency
Continuous review	9
Various forums and meetings	5
Available data	5
Business ideation	5
Good broader purpose	4
Influencing behaviour	3
Strategy aligned to core purpose	3

From the data, it is evident that the leading theme was 'continuous review' followed by 'various forums and meetings'. They fall into the 'forms of meeting' and 'meetings held' code group respectively.

The following quotes relate directly to the theme **continuous review**:

> *"I mean we're obviously also looking at our financial data all the time. So how are we doing financially as a business and what do we need to do to sustain our business, that's a big thing. So, we will look at if we projected revenue from this type of offering and we look at our performance against last year, or even last quarter, what's happening, why's it falling off the bus, what do we have to do to pivot."*
>
> *- Interview 2 (Respondent B 1)*

> *"No, we absolutely review and take very clear – I mean that's all the effort is okay, what's next? So, what, what's next? What is the next step? How are you improving this, how are you optimising it? It's like bread and butter, what we do you don't wait for like annual strategy reviews to do that, it's what we do every single week."*
>
> *- Interview 5 (Respondent D 1)*

> *"And things like you're trying to manage the bottom end of churn, you're trying to make sure that on the top end we're capturing more desks than we're losing on the bottom. You understand on a sub-market basis what vacancies look like. So, everything again comes back to numbers and just constant engagement with the various teams making sure, as I said, everybody's on the right path. That's what we're doing now."*
>
> *- Interview 12 (Respondent H 1)*

From an outcome point of view, a participant commented that they look at their financial data to access performance but also to inform sustainability – this includes looking at the reasons impacting performance and assessing the need to pivot. This continuous review is weekly as opposed to waiting for the annual strategy review. The financials seem to be core to more than one company. Another participant shared that the team makes use of executive summaries which highlights more what lies behind the numbers, for example

the root causes. This in turn could lead to brainstorming sessions across a multifunctional team that would have a set period to revert back with feedback – the ultimate aim of gaining further insights. An interesting insight was that of a participant operating within a smaller environment indicating that continuous review is not that formal, yet past performance does inform overall direction. One participant shared that regular review is necessary to track success and failure. Lastly, there is an understanding that everything comes down to the numbers, constant engagement with the teams with the aim of ensuring everyone is on the right path.

The following quotes relate directly to the theme **various forums and meetings**:

"…there are various forums and meetings, operating committee, steering committee, so it should be documented and they should be minuted if it's good governance and there should be decisions and points and asks within those forums."

- Interview 4 (Respondent E 1)

"So, for us we have performance meetings, business performance meetings, every month and we have a leadership team meeting for the local country, us and the bottling partner, every month. And we of course have a summary of all these reports and so on."

- Interview 6 (Respondent F 1)

"What I find is – so we sit down essentially and look at our numbers across every single team almost on a weekly basis, and I'm looking at that on a monthly basis and on a quarterly basis."

- Interview 12 (Respondent H 1)

From an outcome point of view, there are participants that have shared that all the various forums and meetings should be documented and minuted as this is what good governance requires. The forums as mentioned should indicate decisions, points and asks. Other participants suggest having multiple meetings across levels and partners with a summary of reports being shared. Further participants sit with their teams on a more regular basis – weekly, monthly and quarterly yet the focus is only on the numbers.

Conclusion for RQ 3 results

Companies make use of various models of working such as agile and business canvas. In addition, projects are a popular choice of tool preceded by the business case. Some companies have weekly project forum meetings to fully understand scope and alignment. Other companies build their own tools and processes to support strategy. The same company supports more experimentation with the aim of getting individuals to think differently. Less formal reviews such as break away sessions draw creative ideas from a wider audience. When things return to some form of normality, these types of sessions are fundamental. The importance of regular check-ins ensures alignment towards the vision. Within bigger environments, the process seems quite complex and includes cross-functional sharing of strategies, framing of financials and endorsement at broad level. Thereafter, there are quarterly views of the strategic initiatives which include regular check-ins and board updates. Of great importance are post-evaluation reviews which inform the future.

Monitoring takes place in various forms and on a regular basis with feedback into exco – this ensures alignment across the main strategies. In some instances, there are monthly tracking of half-yearly targets which allows for strategy adjustment if required. There are also formal quarterly updates with the main aim of assessing performance. Some companies are particularly outcomes-based – managing performance per project and also regularly reviewing the business itself. These feedback loops are essential and support quick adaptation – the performance metric becomes fundamental and if not achieved, they pivot accordingly. Data is a crucial part of reporting back with regular updates informing the feedback cycle. At times, data feeds back into company scorecards which are dependent on strategy call-outs. Other tools such as Power BI are used to visually depict the data. Some companies are obsessive with data and use various data platforms to further support – driving everything by numbers.

Financial data is core when accessing performance and sustainability. Some have continuous weekly reviews as opposed to waiting for an annual strategy review. Executive summaries are also useful, focussed on looking at what lies behind the numbers including root causes. Brainstorming sessions can also be used and are made up of a multifunctional team enabling the discovery of further insights. Within smaller environments, continuous review seems less formal yet past performance does affect overall direction. Everything comes down to the numbers supported through constant engagement and path alignment. Forums and meetings should be documented and minuted according to good governance. These meetings should indicate decisions,

points and asks. Others have multiple meetings across levels and partners, and summaries of the reports are shared. There are also those that have more regular interactions but the focus is predominantly on the numbers.

5.4 Conclusion

This chapter utilised the 12 concluded interviews which comprised of interviewees from selected MNEs with a sphere of operations in South Africa, New Zealand, Australia, Italy and the UK, including the subsequent analysis to present the findings. The output linked to the data collected was aligned to the three RQs as identified during the literature review – identification of organisational conditions required for effective strategy implementation, the role of managerial agency in effective strategy execution, and the deliberate integration of both to achieve strategic competitive advantage. Novel interpretations and insights have been revealed through the findings and in addition future research topics have been discovered that fall outside the research scope. Chapter 6 addresses these findings at greater length with the support of the literature review completed in Chapter 2. The ensuing chapter will debate the data using previously established thematic categories. These include 'organisational conditions', 'managerial agency as a component of SI' and 'materiality pertaining to SI'.

CHAPTER 6: DISCUSSION

6.1 Introduction

This chapter presents a thorough discussion around the results from Chapter 5 as established through the unit of analysis – 12 individual interviews. This selection of individuals work in MNEs, are middle-level or higher managers and have direct experience of strategy implementation tools and practices. The RQs as detailed in Chapter 3 are utilised as an outline to analyse and explore the research results more extensively. This breakdown confirms that the RQs as stipulated have been answered and further confer to what degree the results have been confirmed, contradicted or unanticipated when compared with existing literature. In addition, insights, interpretations and alternate viewpoints are explored within the framework of the research study, including the analysis of existing literature as laid-out in Chapter 2.

6.2 RQ 1 discussion: Organisational conditions'

Research Question 1: What organisational conditions are needed for effective strategy implementation?

The results from RQ 1 are provided in Table 6, 7 and 8 of Chapter 5. The aim of the research question was to establish what organisational conditions were needed for effective strategy implementation. The six most prevalent themes that surfaced when exploring the RQ are discussed below.

'Specific processes and steps'

As established, a solid starting point for effective SI is reviewing previous launches or initiatives. Tallon et al. (2019) confirmed this similarity when they elaborated around environmental scanning which assists in identifying threats and opportunities. This can be in the form of a post implementation review which is used to draw up a suitable plan including identifying the resources necessary for an appropriate response. A great strength added to this process is the ability of hindsight, which further supports adaptation to the altering environment.

Another insight from the interviews is around goals feeding into strategy in an attempt to make it a reality and to prioritise the focus. Friesl and Silberzahn (2017) confirmed this similarity by explaining that there are instances where modification within an environment requires alignment. This is done through various actions that lead to a goal, also known as 'managerial coordination'. According to Healy et al. (2015), goal clarity was a basic design characteristic when dealing with strategy workshops. Strategy formulation and

implementation is perceived as a continuum with the strategy framework generally originating from the top. Guo et al. (2017) explained that middle managers are a key part of translating the strategic intent into operational activities. Friesl et al. (2020) described SI as a flexible process involving invention and subsequent application as well as a linear process where planning occurs before activity. Feldman (2020) also confirmed that due to the nature of corporate scope decisions, for example the effect on shareholder value, these decisions are a key focus within senior management meetings.

Interviewers mentioned that numerous iterations occurred before roll-out which included feedback sessions into leadership. Pröllochs and Feuerriegel (2020) confirmed that strategies are understood as adjustable as a result of an existing feedback loop – a form of monitoring that further enables planning to be readjusted.

'Periodic reviews'

As established, there was a general view that strategy formulation and implementation is a yearly process with distinct milestones, with some having a longer five-year view. Strategy is regularly revised in an attempt to track results. Lee and Puranam (2016) explained that a constant drive for perfect SI is of use owing to the majority of strategies being defective. The process referred to above assists with discovering enhancements to existing strategy through learning cycles. An important part of this is the bottom-up feedback cycle. Boussebaa (2015) confirmed that part of a global partner's support involves, amongst other things, yearly reviews

Interviewees provided the feedback that company size plays a role, whether or not a company has a dedicated department that looks into insights and strategy formulation. There appears to be no literature found to confirm this finding; however, this shortcoming could also be linked to the time pressures of this study. Therefore, it is not claimed as a difference or subsequent contribution.

It was established that it is critical to stay close to customers and to understand how things are unfolding. Lee and Puranam (2016) pointed to the suitability of a strategy within a specific industry being key to implementation. The need to be in close proximity to your customers would then come as no surprise to ensure your strategy is suitable. Guo et al. (2017) positioned that middle managers are vital within the practice of 'negotiating' which entails translating strategic intent into operational actions. Additionally, this involves connecting within customers and further providers.

'Pivot to remain relevant'

Externalities have had a major impact on most companies, including their customers, and survival was of utmost importance. Pivoting accordingly has been key with a focus on remaining relevant and adjusting to environmental aspects. Jarzabkowski et al. (2019) explained how individual actions within a company coevolve strategy and structure with a focus on radical change. This type of change is activated through numerous action cycles which are brought about by unplanned consequences which become breakdowns. The 'reflection action cycle' is a key last phase that drives re-alignment to the mandate. Feldman (2020) positioned the importance of adequately understanding or framing the concern, otherwise strategy choices will only partly deliver, or fail. This would be equally important around pivoting to remain relevant. Karim and Capron (2016) explained that when companies revive their abilities focussed on future relevance, it is important to focus on value creation. Current resources need to be re-configured with the main aim around sustaining a competitive advantage.

It was highlighted and deemed very important that the old had to be stopped first, ahead of shifting onto the new. Jarzabkowski et al. (2019) confirmed this thinking when they referred to breakdowns being key for managers as they drive a shift to 'reflection action cycles'. During this final phase, the strategy and structure is recognised as not fit for purpose (mandate) and modifications occur. Nickerson and Argyres (2018) further supported by explaining strategising as made up of two activities, namely framing the issue at hand and generating the solution to resolve the issue.

Smaller business units have made the claim that they have it easier, linked to their flexibility and adoptability. There appears to be no literature found to confirm this finding; however, this could also be linked to the time pressures of this study. Therefore, it is not claimed as a difference or subsequent contribution.

'Adaptation to trends'

Interviewees reported a rapid shift in technology which has made most things possible if enhancements are incorporated in a drive to stay up to date. Hermann and Nnadkarni (2014) confirmed the importance of resource matching particularly when linked to SI progress and firm performance. An insufficient match could negatively affect strategy and ultimately performance. Strategies are perceived as adjustable owing to the presence of a feedback loop which enables progress monitoring. Ultimately, the strategy can be reworked in an attempt to stay up to date with swift changes. Maitlis and Christian (2014) explained that sensemaking plays an important role around understanding

concerns or events and is activated by, for example, environmental pushes. In this case, the environmental pushes can be seen as the technological changes.

There are some that look at external information sources in an attempt to stay current, but balance is key. Pröllochs and Feuerriegel (2020) confirmed that strategy is regularly updated, linked to shifts within the external and internal environment. Karim and Capron (2016) also mentioned that firms renew their capabilities with the ultimate focus around future relevance.

A major emphasis is placed on trends and trend spotting which supports the strategy and subsequent objectives. Pröllochs and Feuerriegel (2020) wrote about strategic management involving analysis amongst others. It would then make sense to view 'trend spotting' as a form of analysis in an attempt to protect or launch a competitive advantage. Lynch and Mors (2019) further supported by explaining that companies are continuously refining and renewing their strategy linked to the quick changing environment – the main aim to deliver.

'Experimenting within a live environment'

To highlight once more, prominence is not given to this theme for the reasons indicated in Chapter 5. Despite this, it is an interesting view that is partly confirmed through existing literature.

A singular view was shared that a culture shift allowing for 'fast failures' would support a quicker arrival within the market of a minimum viable product. A key part of this is iteration supported through the existence of an efficient customer feedback loop. As previously highlighted, Lee and Puranam (2016) conveyed that the attainment of an improved strategy is closely linked to an effective learning cycle based on the current strategy. Furthermore, imperfect strategy implementation is valued, as it provides the means to a bottom-up feedback cycle in an attempt to advance strategy. Arrfelt et al. (2015), indirectly supported this approach as they highlighted that allocating capital within the corporate workplace can cause stumbling blocks, namely excessive investment or moderate investment. It would be safe to assume that based on the quicker arrival to market of a minimum viable product, wiser decisions around allocating capital can be made. Vaara and Whittington (2012) explained that the practices from an SAP perspective are not constrained but are relatively open to facilitate change and iteration.

'Innovation drive'

Continuous innovation is connected to an ongoing awareness of trends and is dominant where driven by companies. Feldman (2020) explained the importance of sufficiently understanding or framing a concern, or else strategy selection could partly deliver or fail. Karim and Capron (2016) talked around reviving a company's capabilities with a focus on the future. They further highlighted the reconfiguration should be a source of value creation with the aim of acquiring or sustaining a competitive advantage. Maitlis and Christianson (2014) explained the critical importance of sensemaking (individual interpretation) around organisational processes such as creativity and innovation. Action is a critical part of sensemaking as the process is based on doing something (implementing) and observing what follows. Open strategy also plays a vital role around innovation and Hautz et al. (2017) positioned that added benefits consist of higher-calibre creativity linked to the magnitude and variety of the contributors, enhanced engagement and the shared sensemaking.

There is a belief that innovation has altered in recent years and is now more reactive linked to the fight for survival. There appears to be no literature found to confirm this finding; however, it could also be linked to the time pressures of this study. It must be added that it is claimed as a tentative research contribution owing to the relatively nascent field around COVID-19's impact on businesses. Furthermore, supporting literature could very well be in the process of being published in appropriate journals.

6.2.1 Theme conclusions – RQ 1

Around the broader theme of 'organisational conditions' as identified in the closing of Chapter 2, the research findings and the existing literature are consistent for the most part and therefore confirm similarities. There were three occasions where findings could not be confirmed based on available literature within the 'periodic reviews', 'pivot to remain relevant' and 'innovation drive' themes. Only one was claimed as a potential contribution as clarified within the relevant theme namely 'innovation drive'.

6.3 RQ 2 discussion: 'Managerial agency as a component of SI'

Research Question 2: What is the role of managerial agency in effective strategy execution?

The results from RQ 2 are provided in Table 9, 10, 11, 12 and 13 of Chapter 5. The aim of the research question was to explore the role of managerial agency linked to effective

strategy execution. The eight most prevalent themes that surfaced when exploring the RQ are discussed below.

'Filtering of information'

Interviewees confirmed that strategy filters down through the organisation and managers in an attempt to remain dated and to ensure progress is tracked. Guo et al. (2017) positioned that middle managers by example are key around the 'negotiating practice' which includes adapting strategic intent into operational actions (deliverables). In addition, it also includes connecting with horizontal work teams, clients and providers. Heyden et al. (2017) explained that the various levels of managers perform different strategy roles, largely dependant on their strengths and weaknesses.

There is a need for strategy to consistently remain fit for purpose (aligned) which is enabled through continuous engagement with all relevant parties which includes support structures. Friesl et al. (2020) explained that the practice of 'negotiating' is linked to SI and involves many groups interchanging resources or insights on various matters. Guo et al. (2017) clarified that middle managers in some instances also have a bridging role linked to political entities with the aim of gaining market efficiency linked to their specific environments. They are believed to be best suited for this role based on their personal networks and operational knowledge. Feldman (2020) further elaborated that corporate strategy attempts to answer how managers form and control the scope within their environment.

There are also instances where information is filtered up with the aim of rectifying a particular concern. As previously highlighted, Lee and Pura (2016) positioned that imperfect strategy is a treasured source for a bottom-up feedback cycle with the main aim driving improved strategies.

'Bottom-up approach'

Based on the interviews, it was established as central for people to feel they have a voice and are being invested in. This in turn supports buy-in into the entity. There is an acknowledgement that this is not an easy balance to attain. Weiser et al. (2020) positioned this well with the explanation of the preferred 'integrative view' which consists of three main activities: namely ceaseless interaction between shaping concepts, enacting and combining multifaceted elements (also known as coordination). The interactions are between a varied set of actors (horizontal and vertical) and there is a continuous feedback loop to top management.

It is known that strategy is normally fed back into exco for debate and approval; and the level of influence around strategy formulation is linked to individual level. Friesl et al. (2020) explained that the 'strategy-as-practice' framework enables the focus on the five implementation processes. What is explained in the opening of this paragraph falls into 'monitoring practice'. These are distinct work actions management completes, connected to SI and SI is believed to unfold from a variety of these previously mentioned practices. As previously mentioned, Heyden et al. (2017) clarified that the different management levels perform dissimilar strategy roles based purely on their strengths and weaknesses.

Some individuals have indicated that their companies have quarterly strategic evaluations where strategy formulation is revised. Boussebaa (2015) clarified that global partners in some instances support by including yearly reviews or mission statements as well as a professional standard measure to ensure quality is guaranteed across locations. There is no specific mention of a quarterly evaluation.

An individual was unsure around the benefit of working with a 'bottom-up' approach and to which degree it mobilises participation. There appears to be no literature found to confirm this finding; however, it could also be linked to the time pressures of this study. Furthermore, it could be that this comment was made based on a negative personal experience by the participant. The only link to Chapter 2 could be in the form of the 'open strategy' where Hautz et al. (2017) engaged around dilemmas of the strategy choice. Specifically, and by example, the 'dilemma of empowerment' could be perceived as overloading the broader audience with strategy strain. The participant did not confirm whether 'open strategy' was indeed used within the linked MNE, therefore it is not claimed as a difference or subsequent contribution.

'Balanced autonomy'

An interviewee suggested that if a strategy is not followed, an explanation would need to be given particularly if already engaged on. There appears to be no literature found to confirm this finding; however, it could also be linked to the time pressures of this study. The only link to Chapter 2 could be in the form of what Pröllochs and Feuerriegel (2020) positioned where they indicated that strategies are adjustable linked to a feedback loop. It is not clear whether it addresses the full concern as in the opening statement. It sounds like a down-right refusal without having consulted. Taking all this into consideration, it is not claimed as a difference or subsequent contribution.

Some individuals empower through completing regular check-ins and standstills – they are there if required. Heyden et al. (2017) commented on an interesting aspect of their study which found improved individual backing of strategy when introduced by middle managers and the execution part driven by top management. They also established that the functions that an array of managers perform is based on their corresponding strengths and weaknesses. Therefore, the comment in the opening sentence around 'if required' would be based on what a manager's shortfalls are. Mantere and Whittington (2021) positioned it well when they explained that turning into a strategist is not about the reasoning skills or the move up the chain, but about individuals thinking and feeling the part. Hautz et al. (2017) positioned open strategy as enabling more individuals to become part of the strategy dialogue. Some benefits include the diversity of the contributors, enhanced engagement and combined sensemaking.

An interviewee suggested that the majority of executable components are linked to funding which encourages greater control and overall business strategy alignment. This is essential the more cross-functional the business is. Feldman (2020) explained that, at times, individuals arrange resources within the parameters of the company (intra-organisational actions). Arrfelt et al. (2015) expanded on this example by elaborating on the two errors that are made in the corporate workplace when allocating capital – in essence excessive investment versus modest investment. This could have serious implications linked to performance. I would then make sense that, as indicated within the opening sentence, more control is exercised around funding.

Regular meetings are supported to confirm alignment across. Executives are in a challenging position – maintaining control at the same time as encouraging autonomy. Placing broader parameters in place is the only solution. Balogun et al. (2014) expanded on the various discursive facets of strategy which form part of various types of talk such as 'watercooler chats' or official meetings. These all tie back to creating, understanding and communicating strategy.

'Consultative/collaborative approach'

Operational discretion enables a sense of partnership, ownership, and self-respect. There is a feeling that the consultative and collaborative process should be common practice. Collaboration commences when the strategy elements are unpacked. Team involvement is key in an attempt to provide additional insights. Jarzabkowski et al. (2019) explained how the actions of individuals within a company coevolve structure and strategy linked to achieving change. Friesl et al. (2020) highlighted how important

'framing' was when conveying strategy. There is a link between framing and for example communication, both of which will drive common understanding amongst managers. Balogun et al. (2014) explained how strategy consists of various types of talk which are crucial for interpreting or communicating strategy. It should then come as no surprise that a 'consultative/collaborative approach' will only strengthen the discursive aspects of strategy.

Financial decisions should be backed by a level of governance. Feldman (2020) explained the impact of various types of owners on the company's strategy and subsequent performance. Linked to this, numerous studies have looked into how the various types of owners' impact governance. Boussebaa (2015) mentioned how global partners support by putting in place cross-national teams but more importantly, how through the setting up of professional standards, they are able to ensure quality across locations. The researcher would argue that this is a type of governance.

Structure has an impact – the flatter encourages ease of collaboration. Lynch and Mors (2019) positioned that SI is challenging due to the repeated changes to the formal structure – consistent readjustment. The researcher would agree with the interviewee's comment in the opening sentence based on the fact that if there is a flatter structure, there is less organisational structure (employee behaviour) to re-arrange, hence there should be increased collaboration. Not much more within last five years of release has been found in the literature around structure. This would be supported by Weiser et al. (2020) who indicated that initial studies were more focussed around, for example, forming ideal structures linked to SI.

'Adaptation to COVID'

Interviewees backed their rankings based on the fact that many of their competitors within the same industry simply did not survive. Weiser (2020) engaged around the 'adaptive turn' in SI which focussed on clarifying organisational behaviour. One such example is 'sensemaking' and this would have been a necessary starting point for all COVID-19 impacted business – gaining a wider understanding of where things are at. Friesl et al. (2020) confirmed SI's adoptive attributes which is further supported by its flexibility. Pröllochs and Feuerriegel (2020) established that changes within a business's external or internal environment will force strategy updates. Additionally, strategic management deals with choice selections and actions introduced to safeguard a competitive advantage. The pandemic would in the main have resulted in a rework and replan of overall strategy.

Most seem to have turned the situation around, although to various degrees. It was viewed as fundamental to stay relevant in the customers' eye, linked to adjusting existing strategy. Nothing around the situation was normal but it was clear that the pandemic had surfaced weaknesses. Lynch and Mors (2019) explained that based on the rapid changing environment, businesses are continuously adapting and renewing with the aim of delivering. Grandori (2020) further positioned that based on these types of 'black swan' events, the chances of returning to a former normality are unlikely. This should be seen in a positive way as the troublesome aspects of the system will need to be corrected. What is critical is resilience across-the-board which will simultaneously drive innovation.

A comment was made that bigger businesses took longer to adjust. The level of adaptation was linked by what companies formerly had in place. All facets of the company had to be reconsidered. Karim and Capron (2016) positioned how firms reconfigure their resources by either adding or recombining. This should be done with the main aims of value creation and to attain or sustain a competitive advantage. There appears to be no literature found to confirm the first sentence of the paragraph; however, it could also be linked to the time pressures of this study. Therefore, it is not claimed as a difference or subsequent contribution.

'Quick adaptation'

There were aspects of the adaptation that were problematic, largely owing to the lockdown or lockdown level adjustments. There is an opinion that companies adapted well considering the complexity of the situation. Amankwah-Amoah (2021) supported this view by explaining that post the pandemic, the focus has veered around how entities can revitalise themselves.

Those who had to adopt to working from home also had to learn quickly whilst maintaining their normal duties. This resulted in a vast learning curve, and it seems the bigger environments took longer to adapt. Ghaurie et al. (2021) indicated that COVID-19 had in many instances accelerated the use of the latest technological trends. Companies are adopting to the latest trends, for example, staying in contact with customers through digital channels.

A view was shared that resilience pre-existed COVID, and relevance of product was very important to survive the pandemic. Annarelli and Nonino (2016) clarified that resilience is the ability to tolerate and counter internal and external factors. They further positioned that a key management challenge is to be more focussed around proactive strategy. In many ways, this is exactly what COVID has taught us – a move away from acting in

response or defence linked to the situation. Grandori (2020) further supported this by explaining that key to moving forward is the existence of broad resilience in addition to innovation and strategy.

Additionally, adaptation to COVID is in many ways a relatively nascent field of study as the pandemic began towards the end of 2019. It follows logic that more and more studies will yet be initiated in an attempt to better understand the impact and response to the pandemic.

It is noted from the relevant rankings that managers within South African based MNEs rated their companies higher on their resilience in contrast to the balance of managers across the globe. The researcher's focus was more around the justification comments linked to the ranking. Although not part of the scope of the study, it must be noted that this could be a very interesting future research endeavour.

'Supported by visible leadership'

Leadership is perceived as a culture that flows down to all levels. Individuals believe it comes to the fore when difficult decisions need to be made. Verweire (2019) positioned that leadership capabilities (or absence thereof) are one of the main reasons SI encounters problems. Friesl et al. (2020) linked leadership styles with 'resource matching' – the link between capabilities and leadership types to strategic intent. Hermann and Nnadkarni (2014) provided further support for this notion when they positioned how CEOs are selected based on the specific strategy. Talent selection is therefore key.

There is an expectation of managers to direct strategic resilience in addition to being open to change. Effectiveness is linked to buy-in across all levels. There needs to be a readiness to engage on crucial matters in an attempt to maintain forward momentum. Verweire (2019) positioned that alignment and commitment to SI are basics in support of strong SI. One can only be open to change and therefore resilient if the need has been identified. Van Rijmenam (2019) highlighted the urgent need for individuals to identify the unfamiliar in an attempt to remain competitive within our ever-changing times. Heyden et al. (2017) explained that the various levels of management can perform different strategy roles depending on their strengths and weaknesses. There is an expectation then around being transparent about what these entitle as they could mean the difference between strategy support or not.

'Flexibility and adaptability'

A view that was shared was that those who do the best are the ones that are most flexible and therefore adoptable to change. A key shift in adapting to change has been being comfortable with the unfamiliar. Friesl et al. (2020) supported this view by explaining that SI is not understood as a linear path. The adoptive properties of SI include flexibility which empowers SI. Once more, as previously highlighted, Pröllochs and Feuerriegel (2020) confirmed that strategies are not rigid, especially those with existing feedback loops. If progress is monitored in this way, strategy planning can be reworked. Lynch and Mors (2019) shared that the quick changing environment causes companies to continually tweak and renew their strategy linked to delivery.

There was a perception that a small business models showed more adaptability and flexibility. Smaller environments respond and change things more effectively, hence the strategy varies less. There appears to be no literature found to confirm this finding; however, it could also be linked to the time pressures of this study. Therefore, it is not claimed as a difference or subsequent contribution.

From an individual's experience, there was a comment made that the corporate environment is less empowering. Hautz et al. (2017) shared an opposing view, especially from an 'open strategy' perspective which grows transparency and encourages inclusivity. Consequently, there is more strategic material available and more people are engaging around strategy. Clarity around whether the example the interviewee was referring too was in actual fact using 'open strategy' was not requested. Therefore, if the MNE the individual was referring too was using 'open strategy', it might be another example of a 'dilemma'.

6.3.1 Theme conclusions – RQ 2

Around the broader theme of 'managerial agency as a component of SI' as identified in the closing of Chapter 2, the research findings and the existing literature are consistent for the most part and therefore confirm similarities. There were four occasions where findings could not be confirmed based on available literature within the 'bottom-up approach', 'balanced autonomy', 'adaptation to COVID' and 'flexibility and adoptability' themes. None were claimed as potential contributions, as clarified within the relevant themes.

6.4 RQ 3 discussion: 'Materiality pertaining to SI'

Research Question 3: How do organisations deliberately integrate (1) & (2) to achieve strategic competitive advantage?

The results from RQ 3 are provided in Table 14, 15 and 16 of Chapter 5. The aim of the research question was to establish how organisations purposely integrate 'organisational conditions' and 'managerial agency' in an attempt to achieve strategic competitive advantage. The six most prevalent themes that surfaced exploring the RQ are discussed below.

'Effective execution and project management'

Businesses use various models of working, for example agile and business canvas. Projects are a prevalent choice of tool initially set-up through a business case. Arnaud et al. (2020) positioned how various tools are utilised when coming to 'negotiating'. The main aim of these tools should be to assist in interpreting the set strategic message to make it easier for others to understand. Their study highlighted the importance of sensemaking and link to strategy materialisation which is a critical skill around SI. Friesl et al. (2020) confirmed that according to the SAP overview, individuals need tools to action strategy work. Demir (2015) positioned that individuals use various material objects to go about their daily duties.

Selected companies have weekly project forum meetings which enable them to thoroughly grasp scope and alignment. These are of course examples of a coordination mechanism as Boussebaa (2015) explained. In their example, they referred to cross-national projects that are made up of a transnational team. The global partners support through reviews and incredibly important is a set of professional standards utilised to drive quality. As previously highlighted, Balogun et al. (2014) confirmed that strategy is made up of many types of talk, for example, meetings. The importance of these forms of discourse is that they form, interpret and communicate strategy. Scope is an important consideration as set out by Feldman (2020), where he explained that scope decisions are inclined to have a significant effect on, for example, operating performance. It then follows that meetings are suitable to ensure projects stay on course.

Some companies mention forming their own tools and processes in an attempt back strategy. This encourages individuals to think differently. Even though there was no specific mention of this within the literature that was reviewed, Friesl et al. (2020) have engaged around performance management systems, for example the use of a balanced scorecard. Today, the idea of the scorecard might not be a new one but what gets placed

on there to measure will be company specific. Therefore, the researcher agrees that there are some examples of companies forming their own tools. Processes, for example 'budgeting systems', would also be dependent on how the financial year runs.

'Various reviews'

It was positioned that less formal reviews for, example breakaway sessions, drive innovative ideas from a wider group. Maitlis and Christianson (2014) explained this approach as sensemaking – utilised by managers to interpret events or concerns linked to, for instance, a planned change intervention. In addition, 'sensemaking' enables processes such as learning and innovation.

Regular check-ins guarantee alignment to the vision. Within the bigger environments, the process includes cross-functional engagement of strategies, setting of financials and confirmation at broad level. The adaptive turn in SI as highlighted by Weiser et al. (2020) indicated the shift away from strategy viewed as just a top-down process. Present exchanges and actions could also include horizontal collaboration between different units. Another example around this is with reference to the 'negotiating' practice. Friesl et al. (2020) talked around different groups exchanging resources or sharing viewpoints. Guo et al. (2017) highlighted the importance of middle managers around this practice which involves connecting with horizontal work teams amongst others.

Subsequently, there are quarterly views of the strategic projects which include periodic check-ins and board updates. Post-implementation reviews are viewed as important as they provide input into the future. Tallon et al. (2019) positioned environmental scanning as a tool to better grasp threats and opportunities within a particular market. Based on the relevant input, a plan can be put in place. Post implementation reviews work in a similar way.

'Performance reviews'

Monitoring occurs regularly and in various forms with feedback into exco driving alignment across. In addition, there are quarterly standstills which assess performance. Friesl et al. (2020) positioned monitoring as a form of control and a source of learning once implementation has occurred.

There are companies that are predominantly outcomes-based. They manage performance for each project and also frequently review the business itself. The feedback loops support rapid adaptation. The performance metric is an important indicator of when a shift (pivot) is required. Lee and Puranam (2016) highlighted the

importance of bottom-up feedback cycles in the quest for improving strategies. Linked to the comment around a 'performance metric', Hu et al. (2017) positioned that supporters of the scorecard indicate that strategy-focussed performance indicators reduce the negative impact of the SI control loop. In conjunction within a nominated strategy, implementation is driven through managing what is visibly observed against the target (budget).

'Business data analytics'

Data is used to report back with regular updates informing the feedback cycle. There are instances when data is fed back into company scorecards which are dependent on strategy priorities. Gibson et al. (2021) positioned the resource-based view as company's having an understanding of their available resources. Resources are thought of as valuable, rare, unique, irreplaceable and strategic. The researcher would argue that the data in his case is viewed in this regard and more specifically as a source of competitive advantage.

Scorecards and key performance indicators have been covered extensively in previous themes.

Additional tools for, example Power BI and data platforms, are used to visually illustrate the data and offer further support. Ghaurie et al. (2021) confirmed that new realities such as the present pandemic had pushed the adoption of the latest trends, for instance 'big data'. Companies have adjusted how they communicate to customers by using digital tools. It is also important to grasp that these trends are in most cases permanent.

'Continuous review'

Financial data is central when evaluating performance and sustainability. Executive summaries are also beneficial as they are focussed on what lies behind the numbers (root causes). Brainstorming sessions are also utilised and are made up of multifunctional teams. This enables the detection of additional insights. Verweire (2019) stated that one of the reasons SI faulters is in fact due to an over reliance on financials linked to strategy debates. Maybe in this instance there is a perceived difference between 'financial data' and 'financials' The researcher would think that financial data could help in informing decisions whereas the latter is engaged around the actual costs of initiatives. Friesl et al. (2020) pointed to current research on monitoring and more specifically to the internal tools that are employed (combining behavioural and financial elements).

Smaller environments use continuous review less formally, but historical performance does have an impact on overall direction. The numbers are key and are further supported through continual engagement and path alignment. There appears to be no literature found to confirm this finding; however, this could also be linked to the time pressures of this study. Therefore, it is not claimed as a difference or subsequent contribution.

'Various forums and meetings'

Good governance requires forums and meetings to be documented. These meetings should specify decisions, points and requests. No added detail is given besides what has already been mentioned under 'consultative/collaborative approach' theme (RQ 2).

Other individuals mention having multiple meetings across levels and partners with subsequent summaries being further distributed. Others interact more regularly with a main focus on the numbers. As previously highlighted, Balogun et al. (2020) positioned that there is an increased curiosity into the discursive aspects of strategy. Meetings are an example of the various forms of talk.

6.4.1 Theme conclusions – RQ 3

Around the broader theme of 'materiality pertaining to SI' as identified in the closing of Chapter 2, the research findings and the existing literature are consistent for the most part and therefore confirm similarities. There was one occasion where findings could not be confirmed based on available literature within the 'continuous review' theme. It is not claimed as a potential contribution as clarified within the relevant theme.

6.5 Conclusion

The results from the data as gathered and examined for this research study established for the most part that the literature supported the findings. The exceptions have been highlighted in the relevant theme and theme conclusions per RQ. The inductively formed themes of 'organisational conditions', 'managerial agency as a component of SI' and 'materiality pertaining to SI' were successfully explored. Even though the three main RQs were answered, what is interesting is that the predominant enquiry into the impact of nudging as a behavioural mechanism did not feature much. There are obvious reasons for this such as the intentional design of the interview guide and the researcher's approach to the data analysis which is discussed in more detail in the subsequent chapter.

There was one instance of a tentative claim made and this derived from RQ 1 and the 'innovation drive' theme. There is a belief that innovation has altered in recent years and

is now more reactive (as opposed to a conscious choice), linked to the fight for survival. As indicated, there appears to be no literature found to confirm this finding. It must be added that it is claimed as a tentative research contribution owing to the relatively nascent field around COVID-19 impact on businesses. Furthermore, literature on this topic could very well be in the process of being published in appropriate journals.

Another interesting theme that surfaced but that is not necessarily part of the research focus is the comparison between small and big business; as an example, small business claims to be more flexible and adaptable to change. This is also unpacked in more detail in the subsequent chapter.

CHAPTER 7: CONCLUSIONS AND RECOMMENDATIONS

7.1 Introduction

In this concluding chapter, the closing comments of the research study are articulated by using the data results and discussion from Chapters 5 and 6. This follows a discussion on the contributions of the study, research limitations and future research recommendations.

A good starting point is referring back to the primary line of inquiry for this research paper that did not dominantly feature in the study, and not at all in the data results as discussed in Chapter 5. There are valid reasons for this, which is explored here and linked to future research opportunities. Firstly, in an attempt to support an exploratory research design, the design of the interview guide purposely did not mention the word 'nudge' or 'nudging'. As highlighted in Chapter 4, the reason for this was to remove all potential bias from the line of questioning (both researcher and respondent) and to ensure data was not contaminated. Instead, qualifiers were used to ensure a targeted sample linked to type of organisation, managerial level and experience of SI tools and practices.

Secondly, the decision was made in Chapter 5 to only list those themes with a frequency of three or more and furthermore to only explore the two most prominent themes per ISQ. The only reason for this was to accommodate the size of the data and to ensure the study remained focussed. Subsequently, the few elements linked to behavioural mechanisms such as 'nudge' did not feature but are visible on the overall coding manager (see Appendix 5 – Coding Manager). As previously highlighted, the future research opportunities linked to these is further explored.

7.2 Contributions of the study – Theoretical, practical or methodological

From a theoretical perspective and as highlighted in Chapter 6, there is a potential contribution in the form of a tentative claim made. There is a sentiment that the concept of innovation has changed within recent years. It is now perceived as more reactive, linked to the struggle for survival as opposed to a conscious choice. However, this would need to be further explored

From a practical perspective, the top featured theme groups per RQ can be thought of as a type of variable checklist of what is required to achieve strategic competitive advantage within the organisation. This is outlined in figure 7 below.
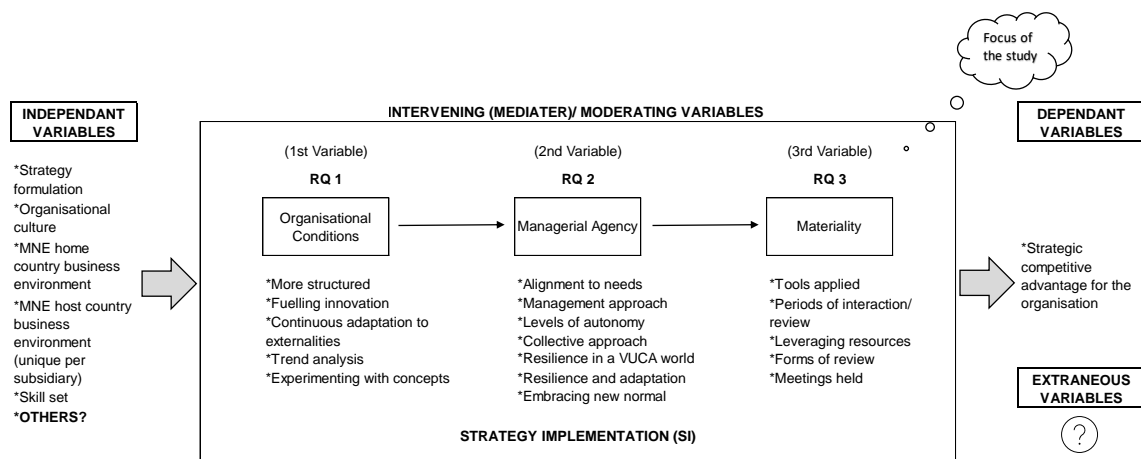
Figure 7: Schematic of Top Featured Theme Groups.

From a methodological, perspective the researcher has made available a ready to use interview guide that can be used in similar studies or in line with future research recommendations as outlined below.

7.3 Study limitations

The limitations within the research paper are varied and need to be acknowledged. Firstly, the sample size of the non-South African MNEs were limited to one participant per MNE. Even though this was done deliberately as outlined in Chapter 4, it does inhibit the comparability. This would need to be addressed by future researchers who attempt a more meaningful comparison, for instance between developing and developed environments. Also linked to sample size, the sub-sample size of 12 interviews is relatively small and as Chapter 4 further revealed, data saturation was not achieved. This could affect generalisability.

Secondly, and supported through hindsight, the researcher established quite late within the study that 'strategy implementation' is also uncommonly referred to as 'strategy execution'. The search for literature was mainly focussed on 'strategy implementation'. A quick assessment via Google Scholar search indicates 142 000 search results for 'strategy execution' versus 1 280 000 search results for 'strategy implementation' (since 2017). This could have resulted in some journals being missed as part of the literature review.

7.4 Recommendations for future research

Multiple novel insights developed during the progression of this research. Against this backdrop, future research papers can focus on these novel insights in an attempt to further the body of knowledge. Firstly, as highlighted in Chapter 6, there is a theme that ascended around the comparison between small (start-up or flat structured) and big business environments and the role size plays, for example, on a business's ability to adapt to change. There is a perception that smaller businesses are nimbler in comparison to bigger business units amongst other details. A future study could be more focussed on this exact comparison.

Secondly, the researcher only focussed on the qualitative data linked to the rating ISQ in RQ 2. As highlighted, it seems interesting that the managers within the South African headquartered MNEs on average rated their organisations' resilience slightly higher in comparison to the rest. A future study could be more focussed on whether there are specific reasons for this, possibly in the form of a mixed method research.

Thirdly, the researcher identified instances during the interviews where, by example, respondents would engage based on an interview question and refer to a 'nudge' (or behavioural mechanism) example but not necessarily understanding it under that term. Therefore, a future study could focus on a comparison between entities 'consciously using nudging', 'unconsciously using nudging' or 'not using nudging' at all. This would further support the logic of triangulation.

Other less pronounced future research recommendations could include altering the lens of the study to compare developed versus developing environments and where the businesses of interest find themselves on the business life cycle (continuum), and the subsequent links to SI.

7.5 Conclusion

The purpose of this research was to gain a better understanding into the impact of nudging as a behavioural mechanism in SI. This was explored through the three themes as introduced inductively. Ultimately, the research aim was to make a valued contribution to the existing literature and scholarly theories.

Although the primary line of enquiry for this research paper did not dominantly feature in the study, the three themes used to generally explore namely 'organisational conditions', 'managerial agency as a component of SI' and 'materiality pertaining to SI' provided multiple insights. These included the organisational conditions required for effective SI,

the role of managerial agency linked to strategy execution and how organisations intentionally integrate the preceding notions to realise strategic competitive advantage.

REFERENCES

Adner, R. (2017). Ecosystem as structure: An actionable construct for strategy. *Journal of Management, 43*(1), 39–58. https://doi.org/10.1177/0149206316678451

Aladag, O. F., Köseoglu, M. A., King, B., & Mehraliyev, F. (2020). Strategy implementation research in hospitality and tourism: Current status and future potential. *International Journal of Hospitality Management*, *88*(May), 102556. https://doi.org/10.1016/j.ijhm.2020.102556

Alvarez, S. A., & Porac, J. (2020). Imagination, indeterminacy, and managerial choice at the limit of knowledge. *Academy of Management Review, 45*(4), 735–744. https://doi.org/10.5465/AMR.2020.0366

Amankwah-Amoah, J., Khan, Z., & Osabutey, E. L. C. (2021). COVID-19 and business renewal: Lessons and insights from the global airline industry. *International Business Review, 30*(3), 101802. https://doi.org/10.1016/j.ibusrev.2021.101802

Ambos, B., Kunisch, S., Leicht-Deobald, U., & Schulte Steinberg, A. (2019). Unravelling agency relations inside the MNC: The roles of socialization, goal conflicts and second principals in headquarters-subsidiary relationships. *Journal of World Business, 54*(2), 67–81. https://doi.org/10.1016/j.jwb.2018.10.001

Annarelli, A., & Nonino, F. (2016). Strategic and operational management of organizational resilience: Current state of research and future directions. *Omega, 62*, 1–18. https://doi.org/10.1016/j.omega.2015.08.004

Arnaud, N., Mills, C. E., & Maton, E. (2016). Materializing strategy in mundane tools: The key to coupling global strategy and local strategy practice. *British Journal of Management, 27*, 38–57. https://doi.org/10.1111/1467-8551.12144

Arrfelt, M., Wiseman, R. M., McNamara, G., & Hult, G. T. M. (2015). Examining a key corporate role: The influence of capital allocation competency on business unit performance. *Strategic Management Journal*, *36*(7), 1017–1034. https://doi.org/10.1002/smj.2264

Balogun, J., Jacobs, C., Jarzabkowski, P., Mantere, S., & Vaara, E. (2014). Placing strategy discourse in context: Sociomateriality, sensemaking, and power. *Journal of Management Studies, 51*(2), 175–201. https://doi.org/10.1111/joms.12059

Barberis, N. (2018). Richard Thaler and the rise of behavioral economics. *Scandinavian Journal of Economics, 120*(3), 661–684. https://doi.org/10.1111/sjoe.12313

Bell, E., Bryman, A., & Harley, B. (2018). *Business research methods*. London: Oxford University Press.

Bell, E., & Vachhani, S. J. (2020). Relational encounters and vital materiality in the practice of craft work. *Organization Studies, 41*(5), 681-701. https://doi.org/10.1177/0170840619866482

Benartzi, S., Beshears, J., Milkman, K. L., Sunstein, C. R., Thaler, R. H., Shankar, M., … Galing, S. (2017). Should governments invest more in nudging? *Psychological Science*, *28*(8), 1041-1055. https://doi.org/10.1177/0956797617702501

Bettis, R. A. (2017). Organizationally intractable decision problems and the intellectual virtues of heuristics. *Journal of Management, 43*(8), 2620–2637. https://doi.org/10.1177/0149206316679253

Boussebaa, M. (2015). Control in the multinational enterprise: The polycentric case of global professional service firms. *Journal of World Business, 50*(4), 696–703. https://doi.org/10.1016/j.jwb.2014.11.002

Buckley, P. J., & Casson, M. (2021). Thirty years of International Business Review and International Business Research. *International Business Review, 30*(2), 101795. https://doi.org/10.1016/j.ibusrev.2021.101795

Burgelman, R. A., Floyd, S. W., Laamanen, T., Mantere, S., Vaara, E., & Whittington, R. (2018). Strategy processes and practices: Dialogues and intersections. *Strategic Management Journal, 39*(3), 531–558. https://doi.org/10.1002/smj.2741

CEO Benchmarking Report 2021. (2021). *Predictive Index*. Retrieved from https://www.predictiveindex.com/ceo-benchmarking-report-2021/

Chabé-ferret, S., & Coent, P. L. (2019). Can we nudge farmers into saving water? Evidence from a randomised experiment. *European Review of Agricultural Economics*, *46*(June), 393–416. https://doi.org/10.1093/erae/jbz022

Dellavigna, S., Berkeley, U. C., Linos, E., & Berkeley, U. C. (2021). *RCTs to scale: Comprehensive evidence from two nudge units* (NBER Working paper 27594) National Bureau of Economic Research. https://www.nber.org/papers/w27594.

Demir, R. (2015). Strategic activity as bundled affordances. *British Journal of Management, 26*(S1), S125–S141. https://doi.org/10.1111/1467-8551.12083

Denzin, N. K., & Lincoln, Y. S. (Eds.). (2018). *The Sage handbook of qualitative research*. Thousand Oaks, CA: Sage.

Deterding, S. (2019). Gamification in management: Between choice architecture and humanistic design. *Journal of Management Inquiry, 28*(2), 131–136. https://doi.org/10.1177/1056492618790912

Dholakia, U.M. (2016). Why nudging your customers can backfire. *Harvard Business Review,* 2–6.

Durand, R., Grant, R. M., & Madsen, T. L. (2017). The expanding domain of strategic management research and the quest for integration. *Strategic Management Journal, 38*(1), 4–16. https://doi.org/10.1002/smj.2607

Ethiraj, S. K., Gambardella, A., & Helfat, C. E. (2017). Reviews of strategic management research. *Strategic Management Journal, 38*(1), 3. https://doi.org/10.1002/smj.2606

Falchetti, D., Cattani, G., & Ferriani, S. (2021). Start with "Why," but only if you have to: The strategic framing of novel ideas across different audiences. *Strategic Management Journal,* (March 2020), 1–30. https://doi.org/10.1002/smj.3329

Feldman, E. R. (2020). Corporate strategy: Past, present, and future. *Strategic Management Review, 1*(1), 179–206. https://doi.org/10.1561/111.00000002

Flick, U. (2018). *An introduction to qualitative research*. Thousand Oaks, CA: Sage.

Friesl, M., & Silberzahn, R. (2017). Managerial coordination challenges in the alignment of capabilities and new subsidiary charters in MNEs. *Organization Studies, 38*(12), 1709–1731. https://doi.org/10.1177/0170840617693271

Friesl, M., Larty, J., & Jacobs, C. (2018). Putting strategy into action – the role of artefacts for business format replication. *European Management Review, 15*(2), 221–235. https://doi.org/10.1111/emre.12119

Friesl, M., Stensaker, I., & Colman, H. L. (2020). Strategy implementation: Taking stock and moving forward. *Long Range Planning*, (April 2019), 102064. https://doi.org/10.1016/j.lrp.2020.102064

Furnari, S., Crilly, D., Misangyi, V. F., Greckhamer, T., Fiss, P. C., & Aguilera, R. (2020). Capturing causal complexity: Heuristics for configurational theorizing. *Academy of Management Review, 46*(4), 778–799. https://doi.org/10.5465/amr.2019.0298

Galbreath, J., Lucianetti, L., Thomas, B., & Tisch, D. (2020). Entrepreneurial orientation and firm performance in Italian firms: The moderating role of competitive strategy. International *Journal of Entrepreneurial Behaviour and Research, 26*(4), 629–646. https://doi.org/10.1108/IJEBR-07-2019-0457

Ghauri, P., Strange, R., & Cooke, F. L. (2021). Research on international business: The new realities. *International Business Review, 30*(2), 101794. https://doi.org/10.1016/j.ibusrev.2021.101794

Gibson, C. B. & Webster, Q. (2021). Expanding our resources: Including community in the resource-based view of the firm. *Journal of Management, 47*(7), 1878–1898. https://doi.org/10.1177/0149206320987289

Gibson, C. (2016). Material Inheritances: How place, materiality, and labor process underpin the path-dependent material inheritances. *Economic Geography, 0095*(March). https://doi.org/10.1080/00130095.2015.1092211

Gino, F. (2017). The rise of behavioral economics and its influence on organizations. *Harvard Business Review, October*(10), online.

Golsorkhi, D., Rouleau, L., Seidl, D., & Vaara, E. (2015). Introduction: what is strategy as practice? In Cambridge Handbook of Strategy as Practice (pp. 1–30). Cambridge University Press. https://doi.org/10.1017/cbo9781139681032.001

Grandori, A. (2021). Dialogue, debate, and discussion black swans and generative resilience*. Management and Organization Review,* (July 2020), 495–501. https://doi.org/10.1017/mor.2020.31

Gubler, T., Larkin, I., & Pierce, L. (2016). Motivational spillovers from awards: Crowding out in a multitasking environment. *Organization Science, 27*(2), 286–303. https://doi.org/10.1287/orsc.2016.1047

Guercini, S., & Milanesi, M. (2020). Heuristics in international business: A systematic literature review and directions for future research. *Journal of International Management, 26*(4), 100782. https://doi.org/10.1016/j.intman.2020.100782

Guo, Y., Huy, Q. N., & Xiao, Z. (2017). How middle managers manage the political environment to achieve market goals: Insights from China's state-owned enterprises. *Strategic Management Journal, 38*(3), 676–696. https://doi.org/10.1002/smj.2515

Hautz, J., Seidl, D., & Whittington, R. (2017). Open strategy: Dimensions, dilemmas, dynamics. *Long Range Planning, 50*(3), 298–309. https://doi.org/10.1016/j.lrp.2016.12.001

Healey, M. P., Hodgkinson, G. P., Whittington, R., & Johnson, G. (2015). Off to plan or out to lunch? Relationships between design characteristics and outcomes of strategy workshops. *British Journal of Management, 26*(3), 507–528. https://doi.org/10.1111/1467-8551.12038

Hernandez, E., & Menon, A. (2018). Acquisitions, node collapse, and network revolution. *Management Science, 64*(4), 1652–1671. https://doi.org/10.1287/mnsc.2016.2691

Hertwig, R., & Ryall, M. D. (2019). Nudge versus boost: Agency dynamics under libertarian paternalism. *The Economic Journal, 130*(October), 1384–1415. https://doi.org/10.1093/ej/uez054

Heyden, M. L. M., Fourné, S. P. L., Koene, B. A. S., Werkman, R., & Ansari, S. S. (2017). Rethinking 'top-down' and 'bottom-up' roles of top and middle managers in organizational change: Implications for employee support. *Journal of Management Studies*, 54(7), 961–985. https://doi.org/10.1111/joms.12258

Höglund, L., Caicedo, M. H., & Mårtensson, M. (2018). Strategic management in the public sector: How tools enable and constrain strategy making. *International Public Management Journal*, 21(5), 822–849. https://doi.org/10.1080/10967494.2018.1427161

Hu, B., Leopold-Wildburger, U., & Strohhecker, J. (2017). Strategy map concepts in a balanced scorecard cockpit improve performance. *European Journal of Operational Research, 258*(2), 664–676. https://doi.org/10.1016/j.ejor.2016.09.026

Ibatova, A. Z., Kuzmenko, V. I., & Klychova, G. S. (2018). Key performance indicators of management consulting. *Management Science Letters, 8,* 475–482. https://doi.org/10.5267/j.msl.2018.3.004

Jacobides, M. G., Cennamo, C., & Gawer, A. (2018). Towards a theory of ecosystems. *Strategic Management Journal, 39*(8), 2255–2276. https://doi.org/10.1002/smj.2904

Jarzabkowski, P., Kaplan, S., Seidl, D., & Whittington, R. (2016). On the risk of studying practices in isolation: Linking what, who, and how in strategy research. *Strategic Organization, 14*(3), 248–259. https://doi.org/10.1177/1476127015604125

Josselson, R. (2013). *Interviewing for qualitative inquiry: A relational approach*. New York: Guilford Press.

Karim, S., & Capron, L. (2016). Adding, redeploying, recombining and divesting resources and business units. *Strategic Management Journal, 37*(13), 1–20. Retrieved from http://doi.wiley.com/10.1002/smj.2537

Kostova, T., Nell, P. C., & Hoenen, A. K. (2018). Understanding agency problems in headquarters-subsidiary relationships in multinational corporations: A contextualized model. *Journal of Management, 44*(7), 2611–2637. https://doi.org/10.1177/0149206316648383

Kunisch, S., Menz, M., Bartunek, J. M., Cardinal, L. B., & Denyer, D. (2018). Feature topic at organizational research methods: How to conduct rigorous and impactful literature reviews? *Organizational Research Methods, 21*(3), 519–523. https://doi.org/10.1177/1094428118770750

Laibson, D., & List, J. A. (2015). Behavioral economics in the classroom: Principles of (behavioral) economics. *American Economic Review: Papers & Proceedings*, 105(5), 385–390.

Lee, E., & Puranam, P. (2016). The implementation imperative: Why one should implement even imperfect strategies perfectly, *1546*(May 2015), 1529–1546. https://doi.org/10.1002/smj

Leiblein, M. J., & Reuer, J. J. (2020). Foundations and futures of strategic management. *Strategic Management Review, 1*(1), 1–33. https://doi.org/10.1561/111.00000001

Leonardi, P. M. (2015). Materializing strategy: The blurry line between strategy formulation and strategy implementation. *British Journal of Management, 26*(S1), S17–S21. https://doi.org/10.1111/1467-8551.12077

Löfgren, Å., & Nordblom, K. (2020). A theoretical framework of decision making explaining the mechanisms of nudging. *Journal of Economic Behavior and Organization, 174*, 1–12. https://doi.org/10.1016/j.jebo.2020.03.021

Lynch, S. E., & Louise, M. (2019). Strategy implementation and organizational change: How formal reorganization affects professional networks. *Long Range Planning, 52*(2), 255–270. https://doi.org/10.1016/j.lrp.2018.02.003

Madaan, G., & Singh, S. (2019). An analysis of behavioral biases in investment decision-making. *International Journal of Financial Research, 10*(4), 55–67. https://doi.org/10.5430/ijfr.v10n4p55

Maitlis, S., & Christianson, M. (2014). Sensemaking in organizations: Taking stock and moving forward. *Academy of Management Annals, 8*(1), 57–125. https://doi.org/10.1080/19416520.2014.873177

Makadok, R., Burton, R., & Barney, J. (2018). A practical guide for making theory contributions in strategic management. *Strategic Management Journal, 39*(6), 1530–1545. https://doi.org/10.1002/smj.2789

Mantere, S., & Whittington, R. (2021). Becoming a strategist: The roles of strategy discourse and ontological security in managerial identity work. S*trategic Organization, 19*(4), 553-578. https://doi.org/10.1177/1476127020908781

Marabelli, M., & Galliers, R. D. (2017). A reflection on information systems strategizing: the role of power and everyday practices. *Information Systems Journal, 27*(3), 347–366. https://doi.org/10.1111/isj.12110

Martin, S., & Ferrere, A. (2017). Building behavioral science capability in your company, 2–7. Retrieved from http://www.ghbook.ir/index.php?name=فرهنگ و رسانه های نوین&option=com_dbook&task=readonline&book_id=13650&page=73&chkhashk=ED9C9491B4&Itemid=218&lang=fa&tmpl=component

Menz, M., Kunisch, S., Birkinshaw, J., Collis, D. J., Foss, N. J., Hoskisson, R. E., & Prescott, J. E. (2021). Corporate strategy and the theory of the firm in the digital age. *Journal of Management Studies, 58*(7), 1695–1720. https://doi.org/10.1111/joms.12760

Micheli, P., & Mura, M. (2017). Executing strategy through comprehensive performance measurement systems. *International Journal of Operations and Production Management, 37*(4), 423–443. https://doi.org/10.1108/IJOPM-08-2015-0472

Mio, C., Fasan, M., & Costantini, A. (2020). Materiality in integrated and sustainability reporting : A paradigm shift? *Business Strategy and the Environment*, (April 2019), 306–320. https://doi.org/10.1002/bse.2390

Mosonyi, S., Empson, L., & Gond, J. P. (2020). Management Consulting: Towards an integrative framework of knowledge, identity, and power. *International Journal of Management Reviews, 22*(2), 120–149. https://doi.org/10.1111/ijmr.12218

Mrkva, K., Posner, N. A., Reeck, C., & Johnson, E. J. (2021). Do nudges reduce disparities? Choice architecture compensates for low consumer knowledge. *Journal of Marketing, 85*(4), 67–84. https://doi.org/10.1177/0022242921993186

Nickerson, J., & Argyres, N. (2018). Strategizing before strategic decision making. *Strategy Science, 3*(4), 592–605. https://doi.org/10.1287/stsc.2018.0066

Olson, E. M., Slater, S. F., Hult, G. T. M., & Olson, K. M. (2018). The application of human resource management policies within the marketing organization: The impact on business and marketing strategy implementation. *Industrial Marketing Management, 69*(February), 62–73. https://doi.org/10.1016/j.indmarman.2018.01.029

Panzone, L. A., Ulph, A., Hilton, D., Gortemaker, I., & Tajudeen, I. A. (2021). Sustainable by design: Choice architecture and the carbon footprint of grocery shopping. *Journal of Public Policy and Marketing, 40*(4), 463–486. https://doi.org/10.1177/07439156211008898

Pröllochs, N., & Feuerriegel, S. (2020). Business analytics for strategic management: Identifying and assessing corporate challenges via topic modeling. *Information and Management, 57*(1), 103070. https://doi.org/10.1016/j.im.2018.05.003

Radaelli, G., & Sitton-Kent, L. (2016). Middle managers and the translation of new ideas in organizations: A review of micro-practices and contingencies. International *Journal of Management Reviews, 18*(3), 311–332. https://doi.org/10.1111/ijmr.12094

Reim, W., Sjödin, D., & Parida, V. (2018). Mitigating adverse customer behaviour for product-service system provision: An agency theory perspective. *Industrial

Marketing Management, 74(June 2017), 150–161.
https://doi.org/10.1016/j.indmarman.2018.04.004

Roscoe, S., Skipworth, H., Aktas, E., & Habib, F. (2020). Managing supply chain
uncertainty arising from geopolitical disruptions: evidence from the pharmaceutical
industry and Brexit. *International Journal of Operations and Production
Management, 40*(9), 1499–1529. https://doi.org/10.1108/IJOPM-10-2019-0668

Samson, A. (2016). *The behavioral economics guide*. Retrieved
from http://www.behavioraleconomics.com.

Saunders, M., Lewis, P., & Thornhill, A. (2019). *Research methods for business
students*. n.l.: Pearson Education

Schubert, T., Baier, E., & Rammer, C. (2018). Firm capabilities, technological
dynamism and the internationalisation of innovation: A behavioural approach.
Journal of International Business Studies, 49(1), 70–95.
https://doi.org/10.1057/s41267-017-0101-0

Schwabenland, C., & Hirst, A. (2020). Hybrid accountabilities and managerial agency in
the third sector. *Public Administration, 98*(2), 325–339.
https://doi.org/10.1111/padm.12568

Sertsios, G. (2020). Corporate finance, industrial organization, and organizational
economics. *Journal of Corporate Finance, 64*(June), 101680.
https://doi.org/10.1016/j.jcorpfin.2020.101680

Tallon, P. P., Queiroz, M., Coltman, T., & Sharma, R. (2019). Information technology
and the search for organizational agility: A systematic review with future research
possibilities. *Journal of Strategic Information Systems, 28*(2), 218–237.
https://doi.org/10.1016/j.jsis.2018.12.002

Sull, D., Turconi, S., Sull, C., & Yoder, J. (2018). *How to develop a strategy for
execution*. MIT Sloan Management Review. Retrieved from
https://sloanreview.mit.edu/article/how-to-develop-strategy-for-execution/

Tan, H., Lv, X., Liu, X., & Gursoy, D. (2018). Evaluation nudge: Effect of evaluation
mode of online customer reviews on consumers ' preferences. *Tourism
Management, 65*, 29–40. https://doi.org/10.1016/j.tourman.2017.09.011

Thaler, R. H. (2017). Behavioral economics. *Journal of Political Economy, 125*(6),
1799–1805. https://doi.org/10.1086/694640

Thaler, R. H. & Sunstein, C. R. (2009). *Nudge: Improving decisions about health, wealth and happiness.* London: Penguin Books.

Vaara, E., & Whittington, R. (2012). Strategy-as-Practice: Taking social practices seriously. *Academy of Management Annals, 6*(1), 285–336. https://doi.org/10.1080/19416520.2012.672039

Van Rijmenam, M., Erekhinskaya, T., Schweitzer, J., & Williams, M. A. (2019). Avoid being the turkey: How big data analytics changes the game of strategy in times of ambiguity and uncertainty. *Long Range Planning, 52*(5), 101841. https://doi.org/10.1016/j.lrp.2018.05.007

Verweire, K. (2019). The challenges of implementing strategy. In *Leading the Project Revolution* (pp. 162-172). Routledge.

Vidal, E., & Mitchell, W. (2015). Adding by subtracting: The relationship between performance feedback and resource reconfiguration through divestitures. *Organization Science, 26*(4), 1101–1118. https://doi.org/10.1287/orsc.2015.0981

Wattanacharoensil, W., & La-ornual, D. (2019). A systematic review of cognitive biases in tourist decisions. *Tourism Management, 75*(March), 353–369. https://doi.org/10.1016/j.tourman.2019.06.006

Watts, L. L., Medeiros, K. E., McIntosh, T. J., & Mulhearn, T. J. (2020). Decision biases in the context of ethics: Initial scale development and validation. *Personality and Individual Differences, 153*(July 2019), 109609. https://doi.org/10.1016/j.paid.2019.109609

Weiser, AK. Jarzabkowski, P. Laamanen, T. (2020). Completing the adaptive turn: A review of strategy implementation research and a research agenda. Academy of Management Annals, *14*(2), 1-38.

Werle, F., & Seidl, D. (2015). The layered materiality of strategizing: Epistemic objects and the interplay between material artefacts in the exploration of strategic topics. *British Journal of Management, 26*(S1), S67–S89. https://doi.org/10.1111/1467-8551.12080

Yin, R. K. (2009). *Case study research: Design and methods* (Vol. 5). Thousand Oaks, CA: Sage

APPENDICES

Appendix 1: Consistency matrix

Research Questions	Literature Review	Data Collection Tool	Data Analysis
1. What organisational conditions are needed for effective strategy implementation?	Friesl et al. (2020) Löfgren & Nordblom (2020) Schubert et al. (2017)	Question 1 in semi-structured interview guide	Frequency analysis/thematic analysis
2. What is the role of managerial agency in effective strategy execution?	Friesl et al. (2020) Vaara & Whittington (2012)	Question 2 in semi-structured interview guide	Frequency analysis/thematic analysis
3. How do organisations deliberately integrate (1) and (2) to achieve strategic competitive?	Friesl et al. (2020) Vaara & Whittington (2012)	Question 3 in semi-structured interview guide	Frequency analysis/thematic analysis

Appendix 2: Interview guide

Theme	Research Questions (RQs)	Interview Schedule Questions (ISQs)	Notes to Interviewer
Qualifiers		**QQ 1.1**: Is the organisation of interest an MNE? **QQ 1.2**: Is the participant from the MNE a middle-level manager or up? **QQ 1.3**: Does the prospective participant have direct experience of 'strategy implementation' tools and practices, either as a recipient or an originator?	*QQ 1.1 considered prior to the interview by the researcher. This question relates to organisational selection. If "No" is the answer to the question, the relevant organisation will not be selected as part of the sample.* *QQ 1.2 and QQ 1.3 considered before individual is selected. If "No" is the answer to any of these two questions, the participant will not be approached to partake in the research.*
Organisational conditions	**RQ 1** What organisational conditions are needed for effective strategy implementation?	**ISQ 1.1**: To what extent is strategy formulation and implementation viewed as a structured process within your organisation? Please elaborate. **ISQ 1.2**: How does your organisation take externalities into account within this process?	

		ISQ 1.3: How does your organisation build responsiveness into the firm's strategy formulation and implementation cycle to support continuous innovation despite the impact of externalities?	*'Externalities' refer to current and predicted future events of a socio-political, economic, environmental or technological nature.*
Managerial agency as a component of SI	**RQ 2** What is the role of managerial agency in effective strategy execution?	**ISQ 2.1**: To what extent do managers in your organisation influence strategy formulation? Please elaborate. **ISQ 2.2**: What level of operational discretion are managers in your organisation given to translate the firm's strategy into executable components? **ISQ 2.3**: On a scale of one to five, how would you rate the resilience of your organisation's strategy formulation and implementation chain to unforeseen external events? Please substantiate your ranking. **ISQ 2.4**: To what extent do managers in your organisation impact this level of strategic resilience? Please elaborate.	*1= very low resilience; 5= very high resilience* *'Strategic resilience' refers to flexibility and adaptability.*

| Materiality pertaining to SI | RQ 3

How do organisations deliberately integrate (1) and (2) to achieve strategic competitive advantage? | ISQ 3.1: What tools and practices are commonly applied in your organisation to the process of strategy implementation?

ISQ 3.2: How does ongoing monitoring take place to ensure that both tools and practices are used effectively?

ISQ 3.3: How is the information derived from monitoring retained and reviewed within the organisation? Please elaborate from the perspective of both current evaluation & future planning. | *'Tools' would typically be formalised/codified processes; 'practices' are frequently informal behaviours.* |

Appendix 3: Letter of informed consent

Informed consent letter

Dear Sir or Madam,

I am currently finalising an MPhil with specialisation in International Business through Gordon's Institute of Business Science (GIBS) University of Pretoria and I am in the process of completing the compulsory research component of the academic programme. I am conducting research to contribute to the field of Strategy Implementation (SI). My research project title is 'Using "nudging" as a behavioral mechanism to enable strategy implementation'. The purpose of this research is to establish which organisational conditions are required for effective SI, the role of managerial agency in effective strategy execution and in what way organisations deliberately integrate the preceding concepts to attain strategic competitive advantage.

I would greatly appreciate your willingness to participate in this study. By signing below, you give your consent to participate. Your permission is requested to record and capture the content of the interview. The interview will be kept strictly confidential and no source, individual or organisation will be identified in the text of the final report. Verbatim quotations from the interview may be used in the report. The interviewwill be a semi-structured, in-depth interview and expected to last 45 - 60 minutes. Please be informed that your participation is voluntary, and you may withdraw at any time without penalty. With your permission, our interview will be transcribed by a third-party for purposes of academic analysis. He/ She will be subject to a standard non-disclosure agreement. All data will be stored without identifiers to preserve confidentiality. On request, a copy of the research findings will be made available to you. The data to be used as part of the report will be publicly available once the examination process has been completed. If you have any concerns, please feel free to contact me or my supervisor, our details are provided below. As an indication of consent please sign below.

Signature of participant:
Date:

Signature of researcher:
Date:

Researcher:	**Research Supervisor:**
[Insert name and surname]	[Insert name and surname]
[Insert email address)	[Insert email address]

Appendix 4: Transcriber non-disclosure agreement

Transcriber Agreement

Transcription Services for the Purpose of Academic Work for Research Project

Research Title: 'Using "nudging" as a behavioral mechanism to enable strategy implementation'

As the researcher I, [Insert name and surname], am bound by the ethical constraints associated with conducting interview-based research. These constraints are imposed by the University of Pretoria's Gordon Institute of Business Science (GIBS). Specifically, the duly constituted GIBS Research Ethics Committee approves the research protocols of all its students conducting research. As such, I am responsible for protecting the identity of the individuals participating in this study, and the organisations to which they belong. I am also responsible for ensuring that organisation-specific material does not enter the public domain without due authorisation.

As a service provider to the researcher I, as the transcriber, acknowledge that I will view information that is confidential and/or proprietary and/or company-specific and is therefore not to be shared with anyone other than the researcher involved in the research project.

CONFIDENTIALITY AGREEMENT

I, [Insert name and surname] agree to transcribe the recordings provided to me by the researcher. I agree to keep confidential all the information transcribed by me.

I will not make any copies of the transcripts or keep any record thereof, other than those required for the research project.

Signature: _____

Date: _____

Appendix 5: Coding manager

	Code	Grounded	Code Groups
●	GC - Be weary of big business blinkers	1	Open-minded
●	GC - Being aware of multiple views	3	Open-minded
●	GC - Clear roles and responsibilities across strategy	3	Strategy process
●	GC - Enhance what is working	1	Continuous improvement
●	GC - Fortunate to have resources	1	Use of various resources
●	GC - Importance of consultants	1	Use of various resources
●	GC - Importance of purpose	1	Guiding principles
●	GC - Negative aspects	1	Leadership behaviors
●	GC - Old culture can delay change	1	Company culture
●	GC - Open eyes to others	1	Open-minded
●	GC - Pause to reflect	3	Strategy process
●	GC - People are fundamental	1	People aspect
●	GC - Positive aspects	5	Leadership behaviors
●	GC - Use of guardrails	2	Guiding principles
●	GC - Values in action	3	Guiding principles
●	RQ 1.1 - At the core of everything	3	More structured
●	RQ 1.1 - Balance of structure	3	Medium structured
●	RQ 1.1 - Customer centric	5	Types of insight
●	RQ 1.1 - Dependant on external and internal factors	1	Types of insight
●	RQ 1.1 - Key guiding principles	3	Guiding principles
●	RQ 1.1 - Lack of structure linked to previous experience	1	Less structured
●	RQ 1.1 - Less structured linked to maturity curve	1	Less structured
●	RQ 1.1 - More formalised as the business gets older	1	More structured
●	RQ 1.1 - More natural	1	Less structured

●	RQ 1.1 - North star focussed	3	Medium structured
●	RQ 1.1 - Periodic reviews	8	More structured
●	RQ 1.1 - Pilot linked to future opportunities	1	Less structured
●	RQ 1.1 - Size enables nimbleness	5	Less structured
●	RQ 1.1 - Specific group works on specific components	3	More structured
●	RQ 1.1 - Specific processes and steps	17	More structured
●	RQ 1.1 - Strategy formulation within business units	4	More structured
●	RQ 1.1 - Tapping into global expertise	2	Types of insight
●	RQ 1.1 - Time for reflection	1	Types of insight
●	RQ 1.1 - Unstructured in terms of the how	2	Less structured
●	RQ 1.2 - Adaptation of trends	7	Trend analysis
●	RQ 1.2 - Balance of risk	2	Risk assessment
●	RQ 1.2 - Challenging the status quo	1	Encouraging through nudging
●	RQ 1.2 - Client pledges to sustainability	1	Macro influences
●	RQ 1.2 - Communication development	2	Encouraging through nudging
●	RQ 1.2 - Continuous tracking and adaptation	2	Continuous adaptation to externalities
●	RQ 1.2 - Customer and competitor focussed	1	Full ecosystem awareness
●	RQ 1.2 - Encouraging behaviors through nudging	2	Encouraging through nudging
●	RQ 1.2 - External research	3	Information sources
●	RQ 1.2 - Extract all value possible	1	COVID example
●	RQ 1.2 - Future orientated	2	Continuous adaptation to externalities
●	RQ 1.2 - Inhibited due to resources	1	Risk assessment
●	RQ 1.2 - Macro factors	3	Macro influences

●	RQ 1.2 - Macroeconomics	1	Macro influences
●	RQ 1.2 - Pivot to remain relevant	7	Continuous adaptation to externalities
●	RQ 1.2 - Relevance of decision making	2	Continuous adaptation to externalities
●	RQ 1.2 - Remain top of mind	1	COVID example
●	RQ 1.2 - Review based on pandemic and available skill set	1	COVID example
●	RQ 1.2 - Risk or opportunity	1	Risk assessment
●	RQ 1.2 - Specific examples	5	COVID example
●	RQ 1.2 - Specialist speakers	3	Information sources
●	RQ 1.2 - Trends informing long range planning	1	Trend analysis
●	RQ 1.2 - View full ecosystem	5	Full ecosystem awareness
●	RQ 1.3 - Agile operating model	1	Specific methodological use
●	RQ 1.3 - Agility	3	Flexible response
●	RQ 1.3 - Balance required between types or projects	1	Experimenting with concepts
●	RQ 1.3 - Business readiness to respond	3	Readiness for any eventuality
●	RQ 1.3 - Clear strategy journey	3	Elements of clarity
●	RQ 1.3 - Enhancement of value proposition	2	Shared value model
●	RQ 1.3 - Experimentation within a live environment	6	Experimenting with concepts
●	RQ 1.3 - Focus on back to basics	2	Fuelling innovation
●	RQ 1.3 - Historical shifts	1	Specific methodological use
●	RQ 1.3 - Innovation drive	5	Fuelling innovation
●	RQ 1.3 - Lack of shared methodology	1	Specific methodological use
●	RQ 1.3 - Natural innovation focus	3	Fuelling innovation
●	RQ 1.3 - New product/ packaging enhancements	5	Fuelling innovation
●	RQ 1.3 - Not enough being done	1	Fuelling innovation
●	RQ 1.3 - Openness to risk	1	Fuelling innovation

●	RQ 1.3 - Proximity to change	3	Awareness of trends
●	RQ 1.3 - Purpose linked responsiveness	1	Guiding principles Purpose driven
●	RQ 1.3 - Purpose linked to ethics	1	Guiding principles Purpose driven
●	RQ 1.3 - Reactive approach	4	Flexible response
●	RQ 1.3 - Senior management involvement	3	Proximity to seniors
●	RQ 1.3 - Smaller entrepreneurial mindset	2	Flexible response
●	RQ 1.3 - Staying ahead of the pack	2	Maintaining industry leader tag
●	RQ 1.3 - World of agile	3	Experimenting with concepts
●	RQ 2.1 - Autonomy linked to experience and understanding	2	Alignment to needs
●	RQ 2.1 - Best results is a combination of styles	1	Management approach
●	RQ 2.1 - Bottom-up approach	5	Management approach
●	RQ 2.1 - Business size/ structure dependant	3	Size and structure
●	RQ 2.1 - Central level decision making	3	Management approach
●	RQ 2.1 - Collaborative leadership	4	Leadership style
●	RQ 2.1 - Consultative style	3	Leadership style
●	RQ 2.1 - Empowerment	2	Leadership style
●	RQ 2.1 - Filtering of information	6	Alignment to needs
●	RQ 2.1 - Integration through threads reviews	2	Vertical/horizontal integration
●	RQ 2.1 - Level dependant	2	Linked to role
●	RQ 2.1 - Open communication channel is key	3	Leadership style
●	RQ 2.1 - Part and parcel of the role	2	Linked to role
●	RQ 2.1 - Participation encourages ownership	2	Leadership style
●	RQ 2.1 - Standstills with input into next cycle	1	Vertical/horizontal integration

●	RQ 2.1 - Top-down approach	2	Management approach
●	RQ 2.2 - Autonomy linked to guard rails	2	Levels of autonomy
●	RQ 2.2 - Balanced autonomy	8	Levels of autonomy
●	RQ 2.2 - Consultative/ collaborative approach	7	Collective approach
●	RQ 2.2 - Dependant factors	6	Driving forces
●	RQ 2.2 - Driving consistency	3	Consistency is key
●	RQ 2.2 - Expectation based on experience	3	Experience driven
●	RQ 2.2 - Freedom of space	3	Levels of autonomy
●	RQ 2.2 - Reflection of what next	1	Consistency is key
●	RQ 2.2 - Research and development	1	Driving forces
●	RQ 2.2 - Struggle for autonomy	3	Levels of autonomy
●	RQ 2.2 - Try novel things	1	Driving forces
●	RQ 2.3 - Adaptation to COVID	10	Resilience in a VUCA world
●	RQ 2.3 - Change in approach	4	Ability to change
●	RQ 2.3 - Composition of the company	1	Ability to change
●	RQ 2.3 - Experiential learning	2	General awareness
●	RQ 2.3 - Flexibility	1	Ability to change
●	RQ 2.3 - Focus on the new need	3	General awareness
●	RQ 2.3 - General awareness of the environment	5	General awareness
●	RQ 2.3 - Importance of guardrails	1	Guard rail focussed
●	RQ 2.3 - Importance of reinvention	3	Ability to change
●	RQ 2.3 - Link to deep routed value system	1	Guard rail focussed
●	RQ 2.3 - Not a smooth process	1	Resilience and adaptation
●	RQ 2.3 - People resilience	2	Resilience and adaptation
●	RQ 2.3 - Quick adaptation	7	Resilience and adaptation
●	RQ 2.3 - Rigour can lead to delays	1	Ability to change

●	RQ 2.3 - Small business resilience	2	Resilience in a VUCA world
●	RQ 2.4 - Active listening to individuals on the ground	2	Active listening
●	RQ 2.4 - Deep routed values	3	Value system
●	RQ 2.4 - Driven by experience	2	Deep understanding
●	RQ 2.4 - Educate upstream	2	Deep understanding
●	RQ 2.4 - Empowerment of people	2	Embracing new normal
●	RQ 2.4 - Flexibility and adaptability	6	Embracing new normal
●	RQ 2.4 - Impact assessment	1	Deep understanding
●	RQ 2.4 - Part of manager evaluation	2	Embracing new normal
●	RQ 2.4 - Perspective	2	Embracing new normal
●	RQ 2.4 - Popular views	3	Restrictive element
●	RQ 2.4 - Question of safe environment	2	Restrictive element
●	RQ 2.4 - Reflect and pivot	3	Embracing new normal
●	RQ 2.4 - Supported by visible leadership	8	Embracing new normal
●	RQ 3.1 - Approach to solving problems	3	Tools applied
●	RQ 3.1 - Bigger picture focus	2	Practices applied
●	RQ 3.1 - Budget process	1	Tools applied
●	RQ 3.1 - Business unit presentation and debate	2	Tools applied
●	RQ 3.1 - Collaborative teamwork	4	Team culture
●	RQ 3.1 - Diverse team	1	Team culture
●	RQ 3.1 - Effective execution and Project management	9	Tools applied
●	RQ 3.1 - Experience	1	Practices applied
●	RQ 3.1 - Frameworks linked to nudging	1	Tools applied
●	RQ 3.1 - Industry comparisons	2	Tools applied

•	RQ 3.1 - Involvement with thought leadership pieces	1	Tools applied
•	RQ 3.1 - Performance management	6	Tools applied
•	RQ 3.1 - Shared value creation	3	Tools applied
•	RQ 3.1 - Sharing of best practices	1	Tools applied
•	RQ 3.1 - Short term focussed on COVID recovery	3	Practices applied
•	RQ 3.1 - Supported by a culture code	1	Team culture
•	RQ 3.1 - Use of the latest technology	1	Tools applied
•	RQ 3.1 - Various reviews	9	Tools applied
•	RQ 3.2 - Business data analytics	4	Leveraging resources
•	RQ 3.2 - Committee use	2	Periods of interaction/ review
•	RQ 3.2 - Consistent feedback loop	1	Leveraging resources
•	RQ 3.2 - Focus on digitalisation	1	Leveraging resources
•	RQ 3.2 - General awareness	2	Into the detail
•	RQ 3.2 - Good governance is key	1	Governance structures
•	RQ 3.2 - Governance structures based on size and investment	1	Governance structures
•	RQ 3.2 - Leveraging research resources	1	Leveraging resources
•	RQ 3.2 - Milestone and benefit achievement	1	Project management
•	RQ 3.2 - Monitoring of investment	2	Periods of interaction/ review
•	RQ 3.2 - Monthly check-ins	1	Periods of interaction/ review
•	RQ 3.2 - More focus required around unfunded projects	1	Leveraging resources
•	RQ 3.2 - Negatively affected by COVID	1	COVID impact
•	RQ 3.2 - Performance reviews	8	Periods of interaction/ review
•	RQ 3.2 - Project tracking	4	Project management

●	RQ 3.2 - Unified approach	1	Leveraging resources
●	RQ 3.2 - Use of 'sprints'	1	Project management
●	RQ 3.2 - Various frequency of meetings	3	Periods of interaction/ review
●	RQ 3.2 - Will become more complex with time	3	Less structured due to size
●	RQ 3.2 - World class	1	Leveraging resources
●	RQ 3.3 - Analysis of data across industry & client base	2	Stored data use
●	RQ 3.3 - Available data	5	Stored data use
●	RQ 3.3 - Business ideation	5	Forms of review
●	RQ 3.3 - Continuous review	9	Forms of review
●	RQ 3.3 - Culture change in play	2	Early stage of development
●	RQ 3.3 - Deep understanding of customer needs	2	Stored data use
●	RQ 3.3 - Extrinsic factors	1	Informs the future
●	RQ 3.3 - Good broader purpose	4	Greater good in mind
●	RQ 3.3 - If an experiment fails it remains that	1	Safe environment to fail
●	RQ 3.3 - Influencing behavior	3	Informs the future
●	RQ 3.3 - Intrinsic factors	1	Informs the future
●	RQ 3.3 - Limited retainment of learnings	1	Forms of review
●	RQ 3.3 - Not necessarily used	2	Stored data use
●	RQ 3.3 - Risk monitoring	2	Informs the future
●	RQ 3.3 - Strategy aligned to core purpose	3	Informs the future
●	RQ 3.3 - Success does not always duplicate	1	Forms of review
●	RQ 3.3 - Various dashboards	2	Stored data use
●	RQ 3.3 - Various forums/ meetings	5	Meetings held