Gordon Institute
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Exploring measuring strategy implementation as a potential barrier to strategy implementation in the South African retail sector

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Abstract

The purpose of this study is to explore how strategies are implemented in the South African retail sector. Furthermore, the study aims to explore how these implementations are measured and how these measurements can potentially act as a barrier to successful implementation of an organisation's strategy. The researcher utilised a qualitative methodology and semi-structured interviews to collect data from relevant individuals within the South African retail sector. Several barriers were identified and the possible reasons for these were defined. Barriers to strategy implementation created by measurements include accuracy, alignment and transparency. Further analysis provided more reasons for these barriers, i.e., planning and structure, competency and team dynamics are the main drivers behind unsuccessful measured implementations.

Key Words

Strategy Implementation; Strategy Formulation; Measurements; Barriers

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 Business Administration 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.

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Chris Everts

7 March 2023

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List of Abbreviations

KPI:	Key Performance Indicator
MNC:	Multinational Company
SME:	Small, Medium Enterprise

Chapter 1: Definition of Problem and Purpose

1.1. Introduction

Company strategies are ever-changing activities that are needed if a company is to remain relevant (De Baat Doelman, Joshi & Bruggen, 2021). These strategies are first formulated and then implemented, yet while the formulation of strategies has been a common topic for years, with vast amounts of literature, company insights and experience having been recorded, little focus has been placed on the implementation of these strategies (Radomska & Kozyra, 2020). Unfortunately, companies that fail to implement their strategies successfully will forfeit any competitive advantage (Iheanachor, 2022).

Strategy implementation plays a major role in the success and outcomes of an original strategy (De Oliveira, Carneiro & Esteves, 2019). Many barriers to strategy implementation have been identified, which include a combination of both financial and non-financial dimensions (Koseoglu, Altin, Chan & Aladag, 2020). One critical barrier to be discussed in this document is the measuring of strategy implementation as a construct. Strategy implementation can be measured in several ways (Amoo et al., 2019; Balajiet al., 2021; De Baat Doelman et al., 2021), however the aim of this research was to gather data and insights from industry experts to establish why this construct is a potential barrier to successful strategy implementation.

This specific phenomenon was investigated within the South African retail sector, which has undergone several changes over the last few decades (Teuteberg, 2021). With South Africa's volatile retail sector, it was selected as a relevant industry to base this research on. Retail companies have been forced to adapt their strategies or even formulate new ones to remain relevant (Das Nair, 2018). It is for this reason that this industry was appropriate to conduct the research on.

1.2. Research Problem

The extant literature shows that insufficient research has been conducted on strategy implementation and its potential barriers and enablers (Radomska et al., 2020). Radomska et al. (2020) also noted that the literature available on barriers to successful strategy implementation to date are universal and not industry or even company specific. De Oliveira et al. (2019) confirmed this by identifying the lack of

strategy implementation literature to date, adding that more focus has been put on the formulation than on the actual execution of strategies. This gap within the research was also commented on by Amoo et al. (2019), who similarly noted the lack of existing literature on the process of measuring strategy implementation. This research gap will be addressed in this document.

To implement a strategy, it first needs to be formulated. Both the formulation and implementation process are equally important to eventually fulfil a strategy (De Oliveira et al., 2019), yet it has been noted that strategy implementation has been neglected when compared to strategy formulation (Aziz Dasan, 2022). This could be because strategy implementation has been found to be a more exhausting and time-consuming process (Tawse, Patrick & Vera, 2019). Several other barriers have also been identified as hindering the success of strategy implementation (Aziz Dasan, 2022), including organisational structure, management capabilities, resource capabilities and poor communication (Koseoglu et al., 2020).

From an operational and real-world point of view, several strategy implementations have failed due to problems with measuring the implementation process (Hoverstadt et al., 2020). Amoo et al. (2019) referred to the fragmentation of existing measurements for strategic implementation, which has caused a failure to create a comprehensive approach to measuring said implementation. For this reason, measuring strategy implementation has been regarded a potential barrier to the success of strategy implementation and will be addressed accordingly in this study.

1.3. Research Purpose

The purpose of this document is to answer the following question:

- How is measuring strategy implementation a potential barrier to strategy implementation in the South African retail sector?

The underlying research and analysis also assess:

- how strategies are implemented in the South African retail sector;
- how strategies are measured during implementation;
- the impact of measuring strategy implementation as a potential barrier to successful strategy implementation in the South African retail sector; and

- possible reasons for measuring strategy implementation being a potential barrier to strategy implementation.

1.4. Research Scope

An exploratory study was carried out to identify the significance of measuring strategy implementation and how this phenomenon acts as a potential barrier to successful implementation of a strategy. While many studies have provided insights into general barriers to strategy (Radomska et al., 2020; De Oliveira et al., 2019; Amoo et al., 2019), this study specifically explored how measuring as a construct acts as a barrier. The results highlight how to identify these barriers and ensure the successful implementation of strategies.

The research was conducted through semi-structured interviews, which collected data from managers within organisations operating in the South African retail sector. Clear insights were gathered, which enabled the researcher to identify several impacts that measurement has on the implementation process, together with the reasoning behind these.

This chapter consists of an overview of the research problem and describes the purpose of the research. It is followed by Chapter 2, which provides an in-depth literature review on strategy implementation, potential barriers and measuring strategy implementation as a potential barrier itself. The literature review also describes research conducted on the relevance of the South African retail industry for the proposed study. Chapter 3 discusses the research questions and is followed by Chapter 4, which offers a detailed view on the methodology followed for the study. Chapter 5 provides an overview of the data collected during the data collection phase and provides a breakdown of the methodology discussed in Chapter 4. Chapter 6 compares the data to the literature reviewed in Chapter 2, before outlining how these relate to the research questions identified in Chapter 3. The document ends with Chapter 7, which provides concluding remarks.

The next chapter outlines the academic literature related to the phenomenon under study.

Chapter 2: Theory and Literature Review

2.1. Introduction

The outline of the literature review is structured to provide a brief overview on the definition of strategy, strategy implementation and how strategy implementation differs from the formulation process. The review also discusses potential barriers to strategy implementation, before focusing on measuring strategy implementation as a construct to strategy implementation. The literature review concludes with an overview of the South African retail sector and its relevance for the proposed study.

The below figure summarises the structure of this chapter:

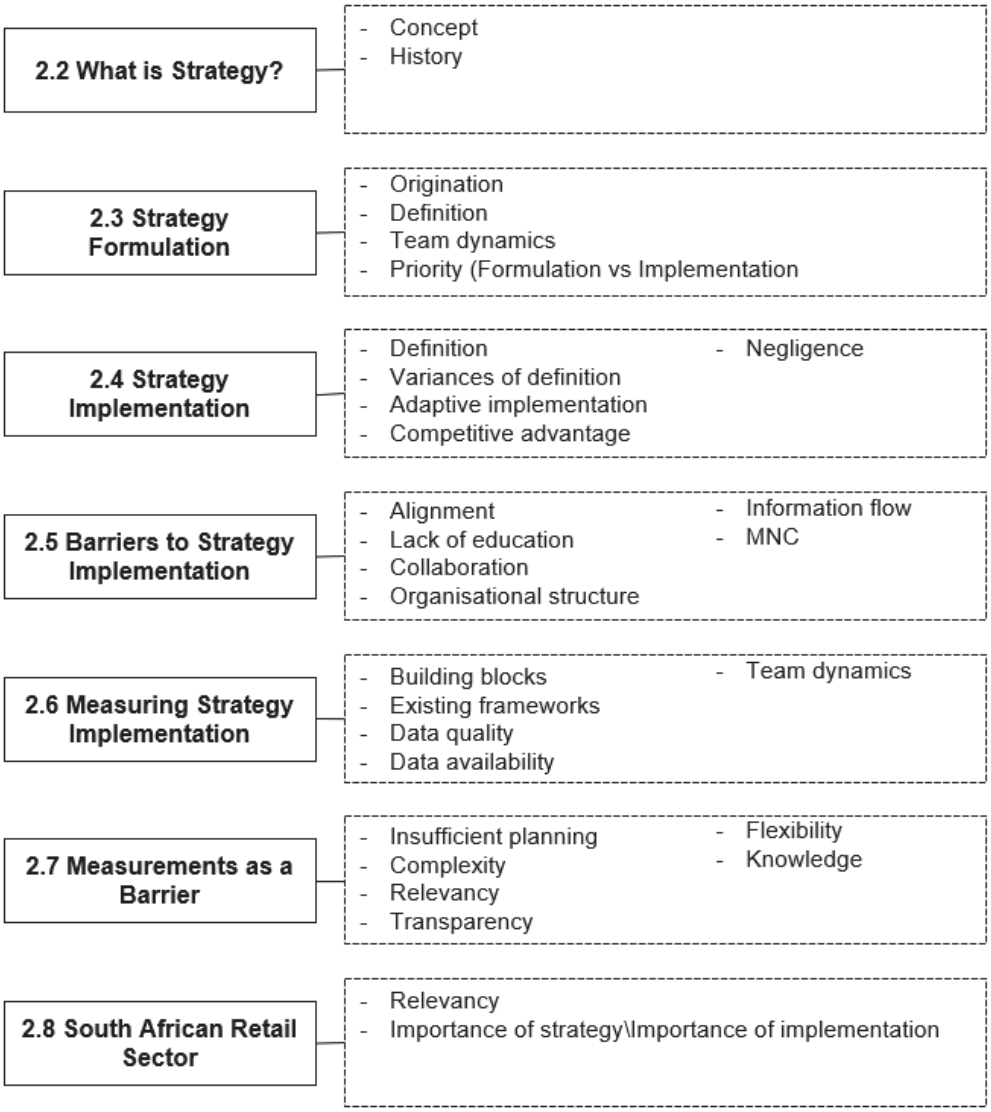

Figure 1: Literature Review Summary

2.2. What is Strategy?

Van den Steen (2018) defined strategy as a set of choices that addresses uncertainties faced by businesses. This definition of Van den Steen (2018) includes an underlying purpose to ensure that all decisions being made are guided towards a specific focus point. Bigelow and Barney (2020), however, claimed that this focus point is economic value, i.e., a strategy is constructed to achieve economic value. Olson, Caplweski and Key (2021) disagreed that strategy is as simple as that, arguing that strategy can be divided into dozens of different types of focus points. Of the many types of strategies mentioned by Olsen et al. (2021), business strategy is most aligned with the definitions of Van den Steen (2018) and Bigelow and Barney (2020), but in addition, strategy determines how a company competes.

The end-to-end process required to fulfil the purpose of a strategy can be classified as strategic management. This process is divided into three stages: strategy formulation, strategy execution and strategy evaluation. In this way, David and David (2017) claimed the measuring and evaluation of a strategy as a separate stage.

2.3. Strategy Formulation

The formulation of strategies broadly deals with the identification and articulation process of a strategy (Koseoglu et al., 2020). Correani et al. (2020) agreed with this definition and contributed to it in their study on the formulation of digital strategies, arguing that strategy formulation is the identification of a firm's current model and what needs to be changed to adhere to the strategy.

Strategy formulation requires a planning mindset, whereas an implementation mindset is required for strategy implementation. In simple terms, Tawse et al. (2019) claimed that strategy formulation (planning) is more fun than the actual execution (doing) of implementation tasks. This creates a so-called "chasm" between planning and doing. Gavrilova et al. (2018) contradicted the majority of other authors, however, by claiming that the formulation of strategies is the more challenging task. He supported this statement by mentioning the number of variables and factors that need to be accounted for.

The phenomenon of strategy formulation was further described by Bryson et al. (2018) as the disciplined effort in which decisions and actions are created to guide

an organisation throughout its operations. Gavrilova et al. (2018) added that strategy formulation is more than just the identification of actions and decisions, but also the process of problem solving, i.e., during the formulation process, the organisation's goals and objectives are to be kept in mind and integrated within the strategy. Parties involved in strategy formulation should thus have that holistic approach at all times.

Zerfass et al. (2018) talked about the importance of increasing communication and collaboration during the formulation process, as a greater involvement of stakeholders during the planning phase increases performance (Bryson et al., 2018). Individual collaboration limits the value of creativity during the formulation phase, noted Paulus et al. (2018), adding that the addition of diversity in teams and groups increases creativity and adds more value to the formulation of a strategy. It is thus important to ensure that sufficient human capital is involved in the formulation process (Adobor, 2019).

Several researchers have described this as "open innovation" (Jin et al., 2022; Adobor, 2019; Campos-Blazquez et al., 2020), i.e., the process in which internal and external stakeholders are involved with strategy formulation (Jin et al., 2022; Aobor, 2019; Campos-Blazquez et al., 2020). Jin et al. (2022) further explained that open innovation can include stakeholders outside of the organisation to broaden ideation and the scope of ideas, which can in many cases decrease risk. Adobor (2019) argued that an open strategy formulation process is better than a top-down approach from senior management, as it opens up the process to all stakeholders and broadens the potential for more ideas.

Abodor (2019) stated that strategy formulation should take place in open forums to ensure that top management is aligned with employees, suppliers and even customers on the ground. This also creates two-way communication between top management and stakeholders, which results in shared understanding and a much stronger commitment towards the strategy. Weiser et al. (2020) agreed with Adobor (2019), stating that strategies should not only be a top-down approach, but can be much more beneficial using a bottom-up approach. By including middle managers in the senior managers' strategic discussions, it will not only broaden the proposed ideation phase, but also increase overall commitment and implementation success (Weiser et al., 2020).

Open innovation has further been explored by Campos-Blazquez et al. (2020), who concluded that there are four main reasons as to why this is recommended. Firstly, it encourages employees to participate in the formulation process; secondly, it allows hidden talent to be revealed and expedited; thirdly, employees favour internal communication which also increases motivation; and lastly, open innovation fosters a culture of innovation and creativity.

2.4. Strategy Implementation

Formulated strategies need to be implemented once the formulation process is completed (Radomska et al., 2020). This section discusses the different views of implementation and the core similarities.

Strategy implementation, as a construct, consists of an aggregated set of integrated factors which are to be executed in a decision-making process (Radomska et al., 2020). De Oliveira et al. (2019) also defined strategy implementation as a combination of action indicators and result indicators, where action indicators refer to the initiatives to be run and the result indicators refer to the expected results and outcomes. This combination is imperative to not only monitor progress, but also to identify potential issues or challenges (De Oliveira et al., 2019). The success of an implementation refers to a firm's ability to ensure consistency between its strategic objectives and its operational actions (Correani et al., 2020). Strategy implementation is thus ultimately the process of translating a formulated strategy into organisational actions (Amoo et al., 2019, Correani et al., 2020). Each of these actions should be linked to goals and sub-goals (Amoo et al., 2019, Alharthy et al., 2017).

Weiser et al.'s (2020) research found that strategy implementation consists of three main elements: conceptualising, enacting and coordinating. These require certain actions to be taken, which include allocating resources, creating processes, setting up communication links, determining information flow and many more (Alharthy et al., 2017; Zerfass et al., 2018).

Given the many different nuances regarding strategy implementation, De Baat Doelman et al. (2021) stated that the reason for this is that formulating a strategy

does not guarantee a competitive advantage for a business; it is only the successful implementation thereof that contributes to a competitive advantage. This statement is supported by research done by Alharthy et al. (2017), who found that many organisations cannot maintain their competitive advantage due to an inability to implement strong strategies.

Strategy implementation is seen by some as a certain way of doing operational things. This unique way of doing things, claimed Zerfass et al. (2018), is what truly drives the outcome of an implementation. They further described how important it is that those individuals executing the strategy are aware of the strategy. It is through strategic communication that these teams will be aligned to the strategy and able to execute it according to the original design.

As organisations are constantly seeking a competitive advantage, implementation approaches have seen many changes, for example there has been a major shift in strategy implementation from a controlled and structured process to an adaptive one. Structured and effectively planned strategy implementations have been mostly top-down approaches and provided a systematic view of the entire process, yet these approaches overlook an organisation's social and behavioural dynamics. The adaptive approach has been able to capture these and provided an integrated view of communication flows. Where structured strategy implementations have been top-down, the adaptive approaches have been both bottom-up and horizontal to ensure cross collaboration, which eventually makes the firm more adaptive (Weiser et al., 2020).

The concept of being adaptive can be further supported by Gavrilova's et al. (2018) research on the importance of validating and testing before doing any implementation. Adaptiveness is even further supported by Jin et al. (2022), who raised the importance of customer feedback. Customer feedback should be included into any form of implementation, they argued, especially when it comes to the process of designing new products. It is the responsibility of the right level management to contribute customer feedback towards strategy formulation. These different views regarding strategy implementation thus argue that organisations need to have an adaptive approach to develop a competitive advantage.

Even though strategy implementation can be seen as the main driver of competitive advantage, as indicated by the body of existing literature, both strategy formulation and strategy implementation should be prioritised equally in an organisation (De Oliveira et al., 2019). However, it is seen in many cases that strategy formulation is given much greater priority than strategy implementation. Radomska et al. (2020) mentioned a lack of focus on strategy implementation compared to strategy formulation, noting that this is mainly due to strategy implementation requiring more time and usually being more complicated. This all affects a company's competitive advantage.

2.5. Barriers to Strategy Implementation

One of the main themes of this study is the barriers to successful strategy implementation. This section discusses the existing body of literature on the reasons for, and impact of, these barriers.

One of the first barriers to be discussed in strategy implementation is the concept of alignment. Adobor (2019) stated that an initial critical step is to ensure that the outcome of a formulated strategy is aligned to the actual implementation actions. Secondly, Han et al. (2019) described the importance of strategy alignment within business verticals, stating that vertical strategies are best achieved if aligned with horizontal strategies. This is critical for inter-company alignment. Thirdly, Ates et al. (2018) claimed that misalignment between middle managers, senior managers and the CEO is a barrier. Specific focus must be placed on each leader's ability to envision similar goals and objectives to the CEO of the organisation. These three different views all tie into the alignment of an organisation and its ability to implement a strategy. These types of misalignments are referred to as the "dark side" of visionary leadership (Ates et al., 2018).

The next barrier to successful implementation speaks to a lack of education; many employees are not aware of or do not understand the formulated strategy, and therefore fail to do a successful implementation (Adobor, 2019; Koseoglu et al., 2020). Those who are aware and understand the formulated strategy will most likely be more committed towards the end goal than those who do not (Adobor, 2019). Koseoglu et al. (2020) further discovered through their study that this barrier is mainly

due to the high level of complexity required for strategy implementation and an organisation's ability to keep up.

Senior managers, middle managers as well as staff members should be involved during the planning phase in which the strategy is conceived. By not following this approach, strategies will not be implemented effectively (Alharthy et al., 2017). The existing research speaks to the importance of collaboration across divisions and management levels and highlights how the avoidance of that can act as a barrier. It is thus imperative to include as many stakeholders as possible (Weiser et al., 2020). Weiser et al. stated that traditionally there has been a distinct difference between teams that are responsible for formulating strategies and those responsible for implementing them. The formulation team typically includes top management, who would then hand the formulated strategy over to middle managers, who would then be responsible for the implementation. This distinct divide in many cases has caused strategy implementations to fail due to a lack of involvement of all parties in each phase (Radomska et al, 2020; Weiser et al., 2020; De Oliveira et al., 2019). It is therefore important for organisations to ensure cross collaboration during implementation.

Many strategy implementations are also unsuccessful due to the historic top-down approach by top managers (Weiser et al., 2020), as this influences the company's commitment and involvement, and eventually the overall motivation. Furthermore, Weiser et al. also touched on the rigid and structured implementation plans put in place for employees to execute on, which are not adaptive to unforeseen conditions. In a volatile world, one should be able to have a healthy balance between structure and adaptiveness.

Multination corporations (MNCs) are also experiencing these collaboration-related barriers. In many cases, MNCs face a misalignment between strategy formulation and strategy implementation due to the disconnect between international strategies and local requirements (Lee & Griffith, 2019). Lee and Griffith extended this research by stating that customer relationships can be achieved if an MNC has the ability to interact with local customers. It is thus critical for MNCs to have direct communication with their customers and receive the necessary feedback to ensure their strategies are relevant. In addition to their domestic markets, MNCs must apply this approach

to all markets in which they operate. MNCs operating in a dynamic and volatile industry often struggle to adapt to local markets and apply the necessary changes (Collings et al., 2018; Lee & Griffith, 2019). Lee and Griffith (2019) recommended that MNCs to employ local managers who are accountable for informing MNCs on local market changes and requirements. Song (2021) fully agreed with this, stating that MNCs that do not adapt their global strategies to local markets experience lower profitability margins. National markets should thus take their primary global requirements into consideration, but still adapt to domestic conditions. MNCs are only able to standardise their strategies across various national markets if these national markets have similarities in social, economic, and other aspects, however.

The barriers discussed to this point have been controllable within organisations, yet in certain cases, uncontrollable factors can act as barriers to implementation. We are in an extremely volatile and uncertain society which impacts our predictability capabilities (Brozovic, 2018). This makes it necessary for businesses, small and large, to be able to shift their models and navigate accordingly. Brozovic defined this as being strategically flexible and being able to handle change. This is usually seen when different behaviour results from businesses facing the same challenges. Gavrilova et al. (2018) called this ability an organisation's "adaptiveness", a lack of which makes it challenging for managers to execute on strategies. Furthermore, Gavrilova et al. stated that this level of responsiveness and adaptability should be adhered to and planned for during the formulation process.

An additional barrier to the abovementioned is a lack of proper measuring of strategy implementation (Iheanachor, 2022). Hoverstadt et al. (2020) agreed that inaccurate measurement can contribute to the failure of strategy implementation, yet even though these authors have identified this construct as a potential barrier, concrete evidence still has not been discovered as to how it can act as a barrier. Amoo et.al. (2019) argued that due to a lack of research on measuring strategy implementation, many companies have failed to accurately measure their implementation processes, which has led to failed strategy implementations. Aziz Dasan (2022) noted that there are many frameworks and models to be used for strategy implementation as well as the measuring of strategy implementation but agreed with Amoo et al. (2019) that very little literature and data exist on what influences successful or unsuccessful strategy implementation in terms of measurement.

Many companies fail to gain value when transitioning from strategy formulation to strategy implementation (Correani et al., 2020). Correani et al. mentioned the significant difference between having a sound strategy on paper and the actual implementation thereof, all of which is due to barriers impacting implementation. Given the negligence regarding strategy implementation discussed in Section 2.3, it is important to explore whether this could be due to measurements put in place to measure the implementation process.

2.6. Measuring Strategy Implementation as a Construct

Before any discussions on measurements acting as potential barriers can begin, one must first assess the significance of measuring an implementation process and what it entails. This section discusses the existing literature on measuring strategy implementation.

Looking at the building blocks of measuring strategy implementation, one needs to consider identifying goals and linking indicators to each of these to be measured (De Oliveira et al., 2019; Weiser et al., 2020). Amoo et al. (2019) confirmed the importance of identifying relevant goals and sub-goals and their integration, and linking those with actions (Sangwa & Sangwan, 2017). De Baat Doelman et al. (2021) similarly emphasised the importance of identifying certain dimensions and linking both action steps and goals to each dimension. Radomska et al. (2020) identified several factors that should be measured during strategy implementation, which they divided into measurable and hard-to-measure factors. The former consists of factors such as processes, resources, tools, systems and procedures, whereas the latter consists of factors such as leadership, culture, organisational structure and communication. Radomska et al. further elaborated that a critical link is required between the tools used for execution and the measurements put in place to monitor the process.

Koshtaria (2018) further distinguished this division between measurable and hard-to-measure factors, saying that measuring the performance of strategy implementation is executed as a combination of both financial and non-financial indicators. Financial indicators include sales, turnover, profit, return on equity and cash flow, while non-financial indicators include market share and innovation.

Another distinct division between measurements states that strategies to be implemented can be measured in two ways, namely by vertical and horizontal approaches. The vertical approach refers to measuring the vertical flow of information and materials within an organisation, whereas the latter refers to the horizontal flow of these (Sangwa & Sangwan, 2017). Based on these perspectives, there is a clear division between measurements and their impact on performance.

Several authors have designed and developed measuring tools that can be used to measure implementation (Aziz Dasan, 2022; Balaji et al., 2021; De Baat Doelman et al., 2021; Amoo et al., 2019). A potential framework suggested by Aziz Dasan (2022) refers to Kaplan and Norton's balanced scorecard, which is used to address financial and non-financial indicators. This performance measurement tool can be used to monitor the implementation of activities (Balaji et al., 2021). The balanced scorecard approach is designed to achieve supply chain profitability and was also recommended by Balaji et al. (2021) and Hoverstadt et.al. (2020). De Baat Doelman et al. (2021), on the other hand, referred to Pryor's 5 Ps model, which can be used to measure strategy implementation. The 5 Ps model consists of purpose, principles, processes, people, and performance, where performance is allocated towards measuring implementation. Amoo et al. (2019) constructed a multi-dimensional framework in which several measurable dimensions have been identified to assist strategy implementation. These dimensions consist of project management, resource allocation, organisational structure, senior management involvement, managing change, communication, perceptions, feedback and controls.

Although these models and frameworks exist, they are deemed universal, lack industry-specific insight (Radomska et al., 2020), and have all been identified as potential frameworks to measure implementation. Despite these existing frameworks, insufficient research has been done to date on the impact these can have on the success of a strategy implementation. De Baat Doelman et al. (2021) claimed that there is a lack of focus from managers when it comes to creating proper frameworks to drive implementation. Ben-Gal (2019), meanwhile, summarised this body of literature by stating that measuring strategy implementation must be done by making use of predefined measurements. These existing frameworks are a great means of being proactive about measurement.

Following the identification of a certain framework or approach to measure an implementation, one need to consider which individuals should be responsible for interpreting and managing these measurements. Hoverstadt et al. (2020) stated that even though measuring a typical strategy being implemented is the responsibility of the implementation team, it is still the responsibility of the planning team who formulated the strategy to ensure that the correct measurement framework and indicators are applied. Sangwa and Sangwan (2017) built on this statement by emphasising the importance of collaboration and alignment. Staff members who know which measurements are linked to which company objectives have much more success in ensuring a successful implementation, they claimed. Cross collaboration, together with transparency, is thus key for teams managing measurements and executing strategies.

The next great dependency for measuring strategy implementation is data and the availability thereof; the range and quality of available data really enables businesses to have a competitive advantage (Correani et al., 2020). The quality of data is also key for the validity and reliability of the measurement results (Obeidat & Tarhini, 2016). For businesses to measure their progress and apply a form of analytics, sufficient data is required (Ben-Gal, 2019). This is even more important in the context of digital transformation and companies embarking on similar digital strategies (Correani et al., 2020).

Based on these findings, sufficient tools and frameworks have been identified to measure strategy implementation, yet information on the impact of these tools and frameworks is lacking in existing literature. The next section discusses the impact that measurements can have on implementation, based on existing literature.

2.7. Measurements Acting as a Barrier to Strategy Implementation

For a strategy to be implemented successfully, managers and leaders within an organisation need to be aware of the relevant indicators used as measurements during this process (Alharthy et al., 2017). Alharthy et al. added that these indicators will eventually determine the outcome of the implementation. The identification of these indicators requires sufficient planning (Flake & Fried, 2020), however. Insufficient planning has been a cause of the failure of the implementation of a strategy, and also causes tension in the transition from formulation to implementation

(Koshtaria, 2018). Koshtaria mentioned that this planning should occur during the formulation phase and neglecting it will directly impact implementation. A lack of planning therefore acts as a barrier to successfully measuring strategy implementation.

Validity and reliability are at question the moment measurements are not providing the results and output it was originally designed to (Obeidat & Tarhini, 2016). Sufficient and accurate data is required to effectively measure the implementation process (Alharthy et al., 2017). Organisations are dependent on data availability and accuracy, as most organisations' decision-making capabilities are data-driven (Ben-Gal, 2019; Rapp & Salovich, 2018). This is seen across all verticals of a business (Ben-Gal, 2019). Van Smeden et al. (2019) similarly mentioned the importance of always having reliable measurements, as inaccurate data will lead to the validity of the data being doubted. Furthermore, poor data leads to confusion and eventually a lack in trust (Rapp & Salovich, 2018).

Another issue at hand is the composition and identification of measurements used. Complexity should be avoided when it comes to measurements during implementation (Obeidat & Tarhini, 2016), which occurs when measurements lack simplicity and leads to poor implementation results (Sangwa & Sangwan, 2017).

Measurement transparency is another potential barrier to implementation, as little to no transparency results in the validity of the data and results being questioned (Flake & Fried, 2020). It also limits organisations in terms of identifying threats and being proactive in that regard.

As discussed in Section 2.5, being adaptive in implementation is key. This can be achieved in many ways, but Correani et al. (2020) suggested that one way is to have sufficient feedback information flows to revise strategies. This will also increase relevancy within a measurement. Sangwa and Sangwan (2017) confirmed this by stating that relevancy can be achieved by ensuring that an appropriate amount of flexibility is achieved.

The last barrier that measurements can cause is due to managers' lack of knowledge and understanding about measurements (Sangwa & Sangwan, 29017). This results in confusion amongst managers and strategies not being implemented successfully.

As seen from the existing body of literature, limited research has been conducted on the impact of measurements on strategy implementation and no research has been done specifically within the retail segment. This paper focusses on the South African retail segment and aims to address this gap within existing literature. The next section describes the South African retail segment in more detail and discusses its relevancy within this context.

2.8. Relevance of the South African Retail Sector

The South African retail sector is known for its relevance and impact in South Africa; it is currently the second largest employer in South Africa, with the government in first place (Teuteberg, 2021). This highlights the retail sector's importance to South Africa and its relevance to this study.

The South African retail industry has endured a major hit due to the impact of the global pandemic and the result of national lockdowns. A major retailer, Woolworths, saw a significant drop of 20% in monthly profits in June 2020. Even though 2020 has been reported as one of the most difficult years in the retail sector, it still produced a growth of 3.81%, however (Teuteberg, 2021). Many retailers were forced to adjust their existing strategies and even formulate new ones to remain relevant and profitable. The question remains, however, as to whether these strategies were implemented successfully and how they were measured.

South Africa' largest retailer, Shoprite Holdings, is a good example of a retailer having to be adaptable in the dynamic retail sector. Shoprite Holdings introduced their online shopping strategy, Checkers Sixty60, prior to the announcement of national lockdowns (Teuteberg, 2021). This not only required an extensive formulation of the strategy, but also required appropriate and accurate implementation measures. For this strategy to be effective, Shoprite Holdings identified clear and simple high-level measurements, i.e., customers should be able to place their orders within 60 seconds, and Checkers will aim to make the delivery within 60 minutes (Checkers Sixty60, n.d.). Checkers Sixty60 has proven to be

successful in the online retail market, and competitors have been challenged to adjust their strategies accordingly. This links to building blocks of measuring strategy implementation, as defined by De Oliveira et al. (2019). Without these two major measurable building blocks established by Shoprite Holdings, the Checkers Sixty60 strategy would fail. With little existing research on measuring strategy implementation being a barrier, as mentioned in Section 2.5, further speculation can be made as to whether other retailers in South Africa are experiencing the same urge to adapt their strategies and whether they are capable of measuring the implementation process thereof.

Das Nair (2018) highlighted the successful growth of the South African retail sector post-Apartheid, which contributes to speculation that retailers are experiencing pressure to adapt their strategies. Retail companies have established their target markets and are currently catering accordingly, ensuring that both low and high-income sectors are catered for. Large retail companies have further enhanced their procurement, distribution, and sales processes to increase their overall efficiency and achieve a potential competitive advantage.

The South African retail sector has seen major changes and is projecting even greater changes in both the long- and short-term. Both retail giants and SMEs need to adjust, re-formulate and implement their strategies within the shortest amount of time, yet it is critical that they measure their strategies accordingly. Given the gap in existing literature on how measuring strategy implementation can be a barrier to successful implementation, this document will contribute to the body of literature to further assist South African retailers in a dynamic industry.

2.9. Conclusion

The literature review provided an extensive view of the significance of strategy formulation, implementation, barriers, measurements, and relevance within the South African retail segment, as well as the different processes and responsibilities of strategy formulation and the implementation thereof. Several aspects and characteristics of these two processes were discussed, as were barriers such as measuring implementation.

The literature provides sufficient evidence on measuring strategy implementation, however limited literature is available to address which measurements could potentially act as a barrier to the successful implementation of a strategy. The chapter concluded by describing the South African retail sector and its relevance to the research. No literature is available on measuring strategy implementation in the South African retail sector as well as its potential barriers. This gap clearly identifies the potential value this research will add to the existing body of literature.

Chapter 3: Research Questions

Based on the literature review in Chapter 2, three research questions have been formulated for the proposed study.

3.1. Research Questions

3.1.1 Research Question 1: How are strategies implemented in the South African retail sector?

This question was designed to explore the significance of strategy implementation in the South African retail sector and how strategies are executed (Radomska et al., 2020; De Oliveira et al., 2019).

3.1.2 Research Question 2: How are strategies measured in the South African retail sector?

This question is designed to explore exactly how strategies are measured and the processes are followed to execute them (Weiser et al., 2020; Amoo et al. 2019).

3.1.3 Research Question 3: How is measuring strategy implementation a potential barrier to successful implementation in the South African retail sector?

Research Question 3 is aimed at exploring the construct in order to get more context on the barrier itself (Koshtaria, 2018; Rapp & Salovich, 2018).

3.1.4 Research Question 4: What are possible reasons for measuring strategy implementation being a potential barrier to strategy implementation?

After getting a better overview on the context of the construct explored in Research Question 3, Research Question 4 will provide more insight as to what the potential reasons are for this construct to be a barrier (Alharthy et al., 2017; Van Smeden et al., 2019).

Chapter 4: Research Methodology

4.1. Introduction

This chapter outlines the methodology that was followed in this research. The research presented in Chapter 2 forms a basis of the methodology.

4.2. Research Design

The study included the selection of the correct research approach, which entailed deciding between using an inductive or deductive approach (Saunders & Lewis, 2018, p. 111). According to Greener (2018), deductive approaches are likely to be associated with quantitative studies, whereas inductive approaches are likely to be associated with qualitative studies. Inductive approaches are further defined as a means to create new theories from multiple subjective views. Deductive approaches, on the other hand, were defined by Greener (2018) as approaches to test theories.

Even though subjective views were gathered in this study, an inductive approach was not suitable as the researcher was not creating a theory, i.e., the theory of strategy implementation and the process of measuring it already existed (Radomska et al., 2020; De Baat Doelman et al., 2021; De Oliveira et al., 2019). The study rather aimed to test the theory by means of a qualitative study to gain additional insight into measuring strategy implementation being a barrier. Limited literature exists from a South African retail sector point of view, therefore it was crucial to ensure that the exploration of this was achieved. For this reason, the deductive approach was the best suited approach for the study.

Exploratory studies are primarily used to undertake research on topics that are less understood due to limited existing literature (Saunders & Lewis, 2018, p.115). As mentioned in the literature review, there are existing frameworks for measuring strategy implementation, however there are insufficient industry insights and knowledge in the form of literature on potential barriers to measuring strategy implementation (Radomska et al., 2020; De Baat Doelman et al., 2021; De Oliveira et al., 2019). This study was therefore suitable for exploratory purposes.

Greener (2018) stated that qualitative studies are not suitable for numeric analysis but are rather used to get an understanding of the topic at hand amongst a group of people. Even though the construct analysed in this study contains aspects of

numerical measures and evaluations of strategy implementation, the outcomes sought from the data gathering process were subjective views, insights and experiences. This contributed towards the decision to make use of a qualitative method for this study. Furthermore, this study falls in the domain of strategy implementation, and extant literature within the field of strategy implementation has been predominantly based on qualitative studies (Radomska et al., 2020; De Baat Doelman et al., 2021; De Oliveira et al., 2019). As such, the decision for this study to be qualitative was consistent with the approach used in similar studies.

The next step was to select the proposed philosophy for this study. The interpretivism philosophy refers to the study of human or social phenomena in a specific environment (Saunders & Lewis, 2018, p.108). Greener (2018) provided more insight into the definition of interpretivist philosophy by stating that it is best suited to investigate the perceptions and subjective views of people. As the study positioned itself to explore insights and subjective views on barriers to measuring strategy implementation, the interpretivist philosophy was most suitable.

Finally, the proposed study occurred at a particular time, which would be considered by Saunders and Lewis (2018) as a cross-sectional or “snapshot” study. Due to the time constraints on the duration of the study, this was the most appropriate selection.

4.3. Population

According to Saunders and Lewis (2018), a population refers to the total set of group members on which a study will be focused. As mentioned in Section 1.3, the total set, also known as the population, approached was the South African retail sector. With the most recent innovation explosion in the retail sector following Covid-19, as more retailers focused on shifting strategies towards the digital world of ecommerce and major changes in customer trends, strategy implementation is pertinent to the success of retailers (Business News Daily, 2022). Furthermore, with the South African retail sector being the second largest employer in the country (Teuteberg, 2021), it has a major responsibility to ensure that revised strategies due to a shift in consumer trends (NielsenIQ, 2022) are implemented successfully. To establish whether a company falls within the South African retail sector, Bascur and Rusu’s (2020) definition of the retail sector was applied, which states that it is the grouping

of several activities to provide products and services to match the needs of end consumers for personal use.

This population can be further narrowed down by focusing on managers (middle managers, senior managers, and executives) who are responsible for either formulating or implementing strategies, who are employed within companies that operate in the South African retail sector. The retail companies in which these managers worked had to have been operational for more than five years, i.e., they did not fall within the start-up phase, and had to have a minimum of 100 employees (Balova, 2018). This eliminated typical start-up strategies and enabled a focus on more relevant strategies from established corporations. Balova concluded that large corporations provide more credible insights to the retail sector, as these players have been operating in the market for several years. The individual managers were selected due to their roles and responsibilities, i.e., responsibility for the successful implementation of strategies, which includes defining clear goals; determining roles and responsibilities; delegating work; executing a plan; getting project closure; and being retrospective on its effectiveness (Miller, 2020). These responsibilities are critical for these roles, and individuals with these responsibilities were assumed would be able to provide relevant information.

4.4. Sampling Method and Size

The sampling method was designed specifically to assist researchers as it is not always possible to interview an entire population (Greener, 2018). Individuals within the chosen population who are identified are called the sample (Creswell, 2009). Sampling methods in general can be classified as either probability sampling or non-probability sampling (Saunders & Lewis, 2018). With probability sampling, the complete list of potential interviewees is known, whereas in non-probability sampling, that list is unknown. As it was not possible to determine the entire list of managers employed in companies within the South African retail sector, non-probability sampling was used.

The next step was to decide the type of non-probability sampling to be used. Purposive sampling falls within the broader category of non-probability sampling and is often used in qualitative studies (Greener, 2018). Saunders and Lewis (2018) defined the purposive sampling method as an approach to get a better understanding

of the topic being researched. The researcher's judgement needs to be considered during this sampling method, therefore this sampling method was ideal as judgement was needed on the correct sample to interview. Purposive sampling was also appropriate as this study used a qualitative exploratory approach to gain a better understanding of the topic.

The final step was to establish which variety of purposive sampling to choose. The sample approached included both male and female managers of any age, employed with companies operating in the South African retail sector. Saunders and Lewis (2018) classified this as a heterogeneous purposive sampling variety. The heterogeneous purposive sampling method is ideal for a sample size ranging from 12 to 30 people, however saturation was achieved after 13 interviews. Data saturation refers to the point where no new insights are obtained from any data collected (Saunders & Lewis, 2018). The figure below indicates the saturation achieved during the analysis of the data obtained.

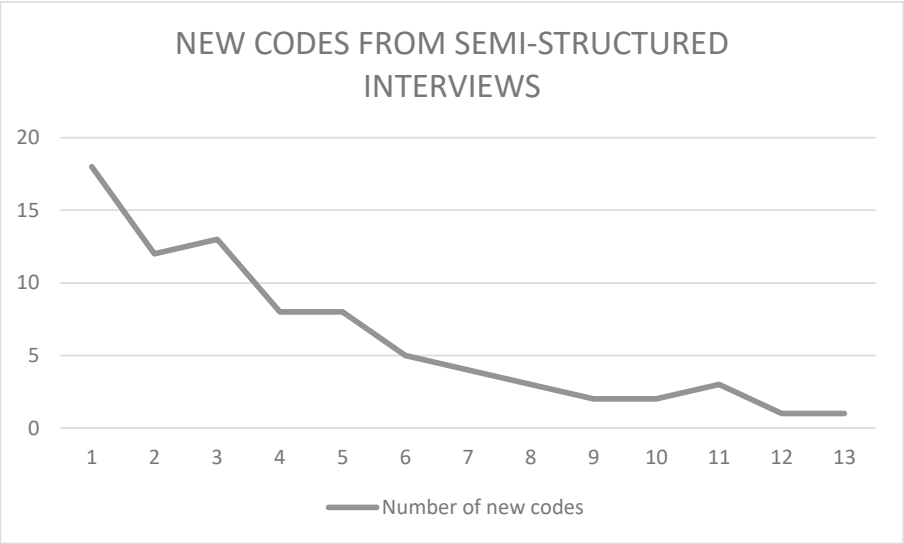

Figure 2: Data Saturation

Once the appropriate sampling method had been established, the next steps were executed as part of the sampling frame:

- Companies within the South African retail sector were identified making use of both Google and LinkedIn search engines. This was assisted by making use of a list of JSE-listed companies, as these have shown to have a tremendous impact

on the South African retail sector (Teuteberg, 2021). This list was not complete, however, and was only used for assistance to initiate the process. This list can be seen in Appendix B.

- Individuals within the identified companies were identified on LinkedIn. Typical job titles were searched for on LinkedIn, including Head of Operations, Change Manager, Product Manager and Group Strategy Manager. These titles are typically responsible for either the formulation or implementation of strategies and could therefore be used as a guideline. This platform was identified as a platform that would enable the researcher to target the correct sample.
- Once the sample was established, interviews were scheduled. These interviews were held either in person or online, depending on the availability of the interviewees. More information on the interviews is provided in Section 4.5.

4.5. Unit of Analysis

The unit of analysis, or the participant, as Saunders and Lewis (2018) referenced it, is someone who is interviewed from the selected sample during the qualitative data collection process. The units of analysis for this research were managers within the South African retail sector who were responsible for either the formulation or implementation of strategies. These individuals were currently employed at their respective companies to ensure no historic or irrelevant data were collected.

4.6. Measurement Instrument

A semi-structured interview, as a measurement instrument, is a data collection tool by which the questions are not fixed, but rather based on an interview guide (Greener, 2018). This guide is based on several identified topics or themes, which the questions are based on. The questions asked during a semi-structured interview therefore vary depending on the data received. Semi-structured interviews are also recommended for exploratory research (Saunders & Lewis, 2018, p.115). For these reasons, semi-structured interviews were used for this research. The actual execution of the semi-structured interviews is discussed in Section 4.6.

4.7. Data Gathering Process

The data gathering process is divided into three phases i.e., before data collection, during data collection and after data collection. The first phase is typically regarded as the activities that take place before the data gathering process kicks off. These

activities include the application process for ethical clearance as well as pilot tests of the proposed interview guide once ethical clearance is granted. Pilot testing is the process in which the proposed data collection method is used to simulate a data collection process in order to identify any possible issues (Saunders & Lewis). The interview guide can be seen in Appendix C.

The second phase refers to the actual data collection process. The researcher conducted semi-structured interviews, which were recorded with the agreement of the participants. Alternative options were provided to either meet face-to-face or virtually, making use of platforms such as Google Meet, Teams and Zoom. The reasoning for this was due to the nature of remote working as a result of Covid-19, and to provide the interviewees with the convenience of doing an interview at his/her choice of location. The duration of the interviews was intended to be between 45 and 60 minutes, depending on the conversation at hand. This duration was therefore only a guide and was subject to change. The chosen language in which the interviews were conducted was English. This ensured consistency within the data analysis process. Additional data was gathered from company websites and public financial reports before the interviews to get a deeper understanding of the context, as well as publicly available data on South African retail trends and analysis provided by Trade Intelligence.

The last phase of this process was to translate the recordings into transcripts, which were analysed and coded to identify potential trends and themes. The recordings were stored on cloud storage services to always ensure data availability.

4.8. Analysis Approach

All recordings gathered from the interviews were translated into transcripts, making use of relevant qualitative data analysis software (CAQDAS) such as ATLAS.ai (Saunders & Lewis, 2018). Manual interpretation was used in the event of any malfunction of either the recording or software. The next step was to analyse the data with the aim of identifying several themes, trends or patterns within the data. Braun and Clarke (2006) proposed a multi-step framework that was applied throughout the process, which consisted of:

- familiarisation of data;
- identifying codes (coding);

- theme generation;
- theme reviews; and
- defining themes.

4.9. Quality Controls

Reliability and validity are crucial to measure gathered data (Saunders & Lewis, 2018). To achieve reliability and validity of the data captured, a standardised interview guide was used. This contributed towards interviewees being able to fully explore the topic and questions at hand. Qualitative interviews are mostly subjective and interviewee biases can easily impact the results (Saunders & Lewis, 2018), thus the interview guide was standardised to avoid unnecessary interpretations and biases. Lastly, the standardised interview guide was not shared beforehand with the interviewees as it could also potentially create a bias.

As mentioned in Section 4.6, the interviews conducted, whether face-to-face or virtual, were recorded with the permission of the interviewees. These recordings and the translated transcripts were stored on cloud storage to ensure that both the researcher and external parties can access the data in the future.

Focus was put on the accuracy and feedback of the pilot test once ethical clearance was granted. This ensured that the underlying themes within the structure of the interviews were aimed towards gathering relevant and appropriate data.

4.10. Limitations

The following research limitations were identified:

- Based on Covid-19, the majority of interviews were held virtually, which had the potential to be interrupted due to technical reasons such as loadshedding or limited infrastructure. To prevent the interference of such events, requests were sent out to the interviewees to do the interviews where electricity back-up resources were available.
- The interviewer conducting the interviews was not an expert in this role, which might have impacted the results.

- Certain biases might have existed due to the limited sampling frame. Only companies within the South African retail sector were approached, thus further research could be conducted on other sectors within South Africa.
- The insights and themes identified from the interviews were only from the perspectives of managers within the relevant companies, which could create a limited view of the actual results of the implemented strategies. This could be broadened by a future study that includes all employees within the South African retail sector.
- This study only focussed on investigating the reasoning behind measuring strategy implementation as a potential barrier to successful strategy implementation. Further research could be done on the formulation of new measuring techniques to be applied to strategy implementation.
- This study is based on qualitative research which results in personal views and insights being gathered. Future studies could include quantitative research and analysis on the topic.
- Given the limited timeframe, only 12 to 30 individuals could be interviewed within the South African retail industry. This is a small number of managers compared to the entire potential number of managers within the sector. Future research can include a larger sample size to get a more accurate view on the outcome.
- This research was only based on the South African retail sector; additional research on other international retail sectors will contribute to the existing body of literature.
- Further research can be done on SMEs and start-up organisations to have a comparison on how these compete with larger corporations and how their barriers to a successful implementation might differ.

4.11. Project Plan

A project plan was created with the aim of managing all deadlines and deliverables for the completion of the final document, due Tuesday 7 March 2023. The project plan took the following into consideration:

- Research project proposal deliverables.
- Research project final submission deliverables.
- Remaining MBA core module classes, assignments, and deliverables.

- MBA elective classes, assignments, and deliverables.

Microsoft Excel was used as the tool to create, update, and manage the project plan, which was designed to provide a holistic view of all the deliverables and deadlines, and to track each line item's progress with completion bars. A detailed breakdown of the project plan on a line-item view, as well as a Gantt chart view, can be seen in Appendices D and E respectively.

Chapter 5: Results

5.1. Introduction

The chapter reports on the results of the 13 interviews obtained during the data collection phase. Managers within the South African retail industry were interviewed to gain a deeper insight into the significance of strategy implementation and the measurement thereof. The results in this chapter are structured according to the research questions discussed in Chapter 3, with the findings being presented at the theme level. Themes were gathered from the data through a thematic qualitative analysis approach. The questions were designed in such a way as to gather necessary data regarding the formulation and implementation of retail strategies and the impact of measuring these strategies.

The chapter starts with a description of the sample and is followed by a detailed report on the themes and their relationships.

5.2. Sample and Context Description

South Africa's retail industry consists of a diverse landscape. Traditional retailers utilise brick & mortar facilities, yet some of these, together with more recent retailers, also use hybrid platforms, i.e., they have both online platforms and brick & mortar facilities to interact with customers. Lastly, some retailers only have an online platform to interact with customers. Therefore, the sample selected to represent the population consisted of managers within this diverse landscape, who were responsible for strategy formulation or strategy implementation, or sometimes both.

The table below provides a list of all participants and their roles within their organisations.

Participant	**Role**	**Role Description**
Participant 1	Senior Project Manager	Project manager role looking after fulfilment and product delivery.
Participant 2	General Manager	Manages and operates several hypermarkets across South Africa
Participant 3	Senior Buying Manager	Manages buying team together with planning and procuring product lines

Participant 4	Head of Sustainability	Head of sustainability practices across all trading divisions
Participant 5	Head of Supply Chain Integration	Aligns all training divisions with logistics and supply chain divisions
Participant 6	Head of Global IT	Manages internal innovation initiatives and drives technology and infrastructure across the organisation
Participant 7	Head of Marketplace	Oversees all subsets of the marketplace and drives operational and commercial agendas.
Participant 8	Inventory Operations Manager	In charge of inventory operations across Africa
Participant 9	Retail Branch Manager	Operational management and implementation of new product lines
Participant 10	Head of eCommerce Marketplace	Manages and operates marketplace and enables business development
Participant 11	Planning Executive	Plans product lines for different clothing categories
Participant 12	Planning Analyst	Clothing line planning and account management
Participant 13	Head of Digital	Actively manages and mentors the digital marketing team and coordinates project management teams

Table 1: List of Participants

The graph below indicates the breakdown of the organisational business models that the participants were part of. Three models were identified: hybrid, brick & mortar and online.

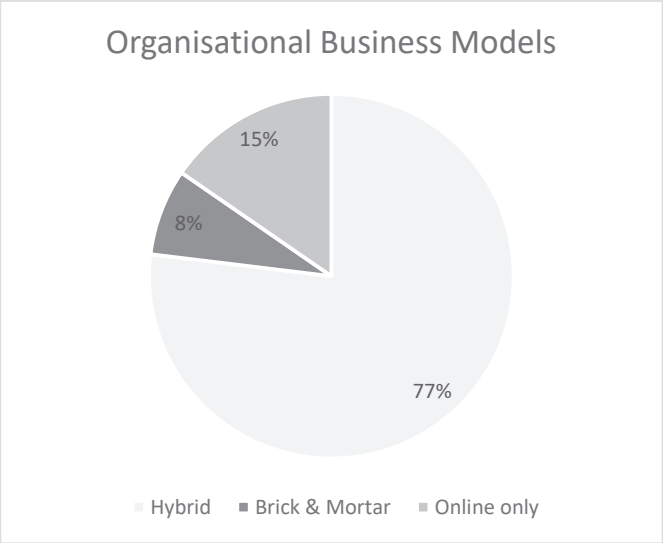

Figure 3: Organisational Business Models

The graph below indicates the different levels of management amongst the participants who took part in the semi-structured interviews.

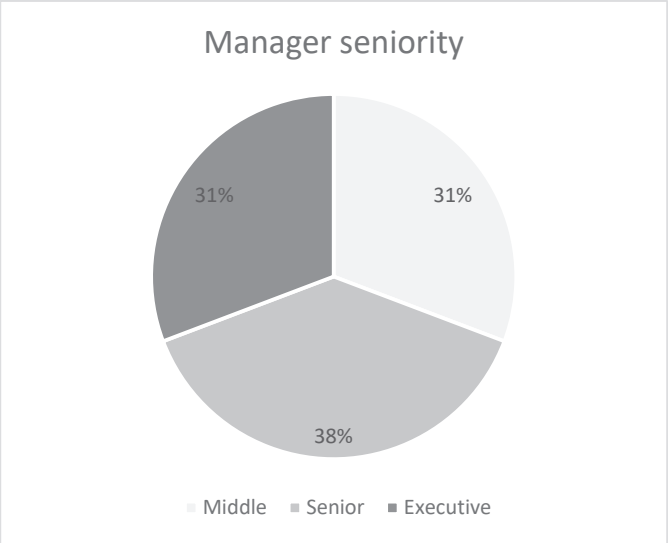

Figure 4: Manager Seniority

The last graph below illustrates the different categories of retail organisations represented by the interviewees. The three categories include supermarket, clothing and e-commerce.

Figure 5: Retail categories

No names of any participants were recorded during the semi-structured interviews, thus the participants were completely anonymous. This allowed the interviewer to provide confidential information to the questions asked. As seen in the table above, gender agnostic pseudonyms were used.

A total of 15 interviews were conducted during the data collection phase. Two of these were used as pilot interviews to reframe and restructure the interview questions. Two interviews were sufficient to achieve a relevant interview guide for the remaining 13 interviews.

All interviews took place at the convenience of the participants. The option to do an in-person or remote interview was given to all participants, all of whom chose the latter. A consent letter from GIBS was sent to each participant well in advance. No interview questions or guiding collateral were provided to any participant before the interviews.

Table 2 lists all the themes and respective codes within each research question. The following sub-section of Chapter 5 will report these themes in more detail.

Research Question	Theme	Code
1. How are strategies implemented in the South African retail sector?	Strategy Formulation	Formulation & Implementation teams combined
		Formulation & Implementation teams not combined
		Anyone can recommend ideas/strategies
		Top down
	Strategy Implementation	Amend top-down strategies to meet departmental requirements
		Cannot change much
		Bottom-up feedback
2. How are strategies measured in the South African retail sector?	Measurement Identification	Align measurements with business objectives
		All boils down to sales
		Define KPIs locally
		Measurements should be part of strategy formulation
		Measurements must be flexible
		Measurement: Need to keep KPIs simple
	Measurement Application	Different KPIs on different levels
		No specific fixed frameworks for strategy implementation measurement
		Fixed framework for strategy implementation measurement
3. How is measuring strategy implementation, a potential barrier to	Accuracy	Insufficient data
		Faulty measurements
		Measurements not giving expected results
		Measurements are not achieved
		Unreliable measurement

Research Question	Theme	Code
successful strategy implementation in the South African retail sector?	Alignment	Measurement negatively impacts results
		Measurements outside of scope
		Measurements are not realistic
	Transparency	Too few measurements
		Too broad measurements
		No visibility of measurement
		Cannot control measurement
	Individual impact	Measurements are causing confusion
		Measurements are demotivating
4. What are possible reasons for measuring strategy implementation being a potential barrier to strategy implementation?	Planning & Structure	Wrong KPIs on wrong levels
		Insufficient planning
		No flexibility (top-down approach)
		Too many KPIs
		Uncontrollable impact on measurement
		Measurements not relevant
		Measurements are not aligned to context
	Competency	Human error
		Lack of knowledge
		Insufficient technology
		Not efficient enough
	Team dynamics	Disconnect between c-level and middle managers
		No buy-in

Table 2: Themes and Codes

5.3. Results: Research Question 1

RQ 1: How are strategies implemented in the South African retail sector?

The research question aimed to investigate how strategies are implemented in South Africa, specifically focussing on the retail segment. The question also aimed to identify what the dynamics are between strategy formulation and strategy implementation, and how the two are connected.

The themes gathered from each interview were grouped into two different stages of the strategy lifecycle. The first phase starts with strategy formulation, after which it transitions into the implementation phase.

The graph below lists the themes within each phase of the lifecycle, together with the number of entries within each code.

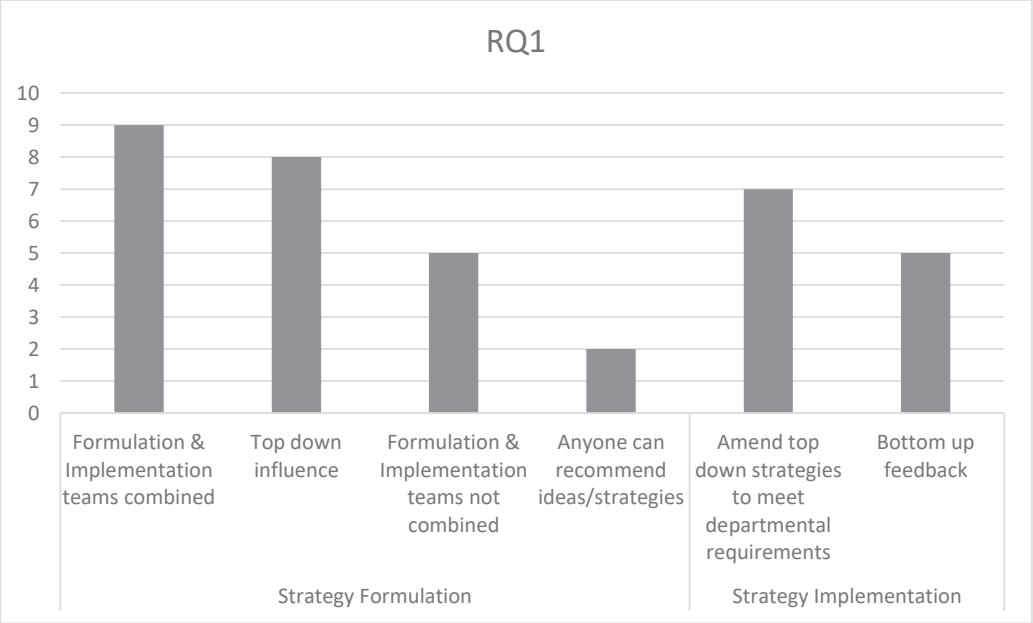

Figure 6: RQ1 Codes

5.3.1 Strategy Formulation

The figure below illustrates the breakdown of codes within the first theme identified: strategy formulation.

Figure 7: Strategy Formulation Theme

5.3.1.1 Formulation and implementation teams combined

Strategies originate in the formulation phase and transition into the implementation phase once they are formulated. The participants indicated that in their respective organisations, these teams are combined and consist of cross functional expertise.

> Participant 12: *"I'm actually on the strategy formulation central planning."*
>
> Participant 4: "*Yes, absolutely. We played both roles so we get to formulate and execute and work across the business."*
>
> Participant 1: *"Like for example we have different teams that will work on an idea tool, from ideation to execution depending on where it fits in particular."*
>
> Participant 11: *"Funny, so although it's very two very different things. If I think about it now the approach is practically the same. Well, it'll be a full on plan that they'll be involved in from the strategic intent to operationally how it happens to tactically."*

Participant 5, a middle manager, elaborated on the importance of being aligned with the business strategy received from the executive level. The combination of individuals responsible for both the formulation and implementation consisted of managers from the executive level all the way to middle management.

> Participant 5: *"And the strategy is to work with the rest of the executive team from logistics and supply chain to make sure that our strategy is up to date, and you know aligned with the business strategy."*

Participants 13 and 10 further elaborated on the importance of having multiple teams collaborating collectively and the benefits an organisation gains from making use of such an approach.

> Participant 13: *"Co-creation makes for the best collaboration and without that sense of cohesion between teams, regardless of whether they are putting into you or not, is fundamental to your business success."*

> Participant 10: *"It's often an all hands-on deck approach. To make sure that we provide a good experience for our customers."*

5.3.1.2 Formulation and implementation teams not combined

Contradictory to Section 5.3.1.1, where participants claimed to have combined teams during the formulation and implementation phases, some participants claimed to have two different distinct teams during these two phases. It was seen that the formulation and execution teams had no cooperation.

> Participant 2: *"There's quite a distinct difference between the formulation team. We have a little leeway in terms of having the holistic company strategy of influencing the company strategy."*

> Participant 9: *"To be honest on that part it already come packaged by the time it lands on our side."*

Participants 2 and 8 both also claimed that their organisations, even though operating in the South African retail industry, have international headquarters where strategies are originally formulated.

> Participant 8: "*So for us, being a global company, most of the ideations happens globally at the Global Head office, which is based in Portland, and so it gets disseminated."*

> Participant 2: *"You basically implement strategies that have been conceived in a suite you know."*

5.3.1.3 Anyone can recommend strategies

With the previous code it was seen that the ideation and execution teams are either combined working collectively on the strategy formulation process, or split in two separate teams focussing only on formulation and execution respectively. Taking a step back, an initial thought or idea still needs to realise before the strategy lifecycle can commence. These initial thoughts and ideas in many cases come from a top-down approach. This code, however, displayed the importance of having those initial thoughts and ideas coming from individuals on various levels throughout the organisation.

> Participant 7: *"A person comes up with an idea. They will chat to their colleagues around them and the people that they think they need to do. They will get advised they will roll people in as they need to be roped in. They will come up with ideas if they are capable technically to execute, they'll execute on the idea."*

> Participant 10: "*But at the end of the day, you know you never want to kind of squash a creative idea. You know something that there's potential in everything and it's always good to test it, and if it's going to fail, make sure it fails fast."*

The data thus indicated that some organisations are willing to gather ideas from various individuals.

5.3.1.4 Top-down influence

The data collected indicated that the formulation and execution teams are combined in some cases and separate in others. Further detailed analysis during the semi-structured interviews was done on the influence and motivation of these phases. In some cases, it was seen that although the teams might be combined or not, the two phases still had some sort of direction and influence throughout the journey.

> Participant 9: *"We need to achieve X, Y and Z for us to be successful. And the second part becomes the ones that the business set out, and that should be standard across stores."*

Participant 12: *"It's a top-down type of strategy, but the execution part of it is done at it at the respective strategic business unit. For example, if I can talk about e-commerce or the top-down, it was a business strategy that happened at the top level and then it was cascaded down."*

Participants 9 and 1 both indicated the influence that their international headquarters have on the strategy formulation and how strategies need to be altered to meet their international requirements.

Participant 9: *"If you're walking in South Africa and Australia, you should get the same service, the same atmosphere, the same product, and the type of service we give to you."*

Participant 1: *"Somewhere in Australia or the US, that idea will come to the team. And as a team, we go through the idea validation and it goes through the process of, you know, like the we call it the discovery process and we see how feasible that is."*

Participants 3, 4 and 13 talked about the importance of having a "north star" that guides the strategy. In these cases, it is the core objectives of an organisation that constantly need to influence the formulation phase to ensure that organisational goals are met.

Participant 3: *"You still drive the group strategy because the group strategy almost becomes the guiding star. The 'north star', and there is no real flexibility to change it. So, for argument's sake, if the group says that we're going to leverage customer data to provide a better omni channel experience, I can't go and say guys, 'I don't believe'. Doing this, this is not something we should be doing because that is board directive that is signed off by the CEO, the CFO, the Chairman of the board. It goes in because we are a listed company. It goes into our integrated annual report, so there's that strategy, is locked. It is watertight."*

Participant 4: *"Yeah it is definitely top-down so the group has a direction that it wants to take in the next 10 years for example and so you know all the different strategies then align with that direction."*

Participant 13: *"You start with core business objectives. So what is the organisation trying to achieve, like what are they? What are their main goals right?"*

5.3.2 Strategy Implementation

The second theme and phase of the strategy lifecycle identified in Research Question 1 focusses on the actual implementation of the strategy. Within this phase, several codes were identified regarding how the implementation goes about, taking the previous phase into account.

The figure below illustrates the codes together with the theme, strategy implementation, which were identified during the data analysis.

Figure 8: Strategy Implementation Theme

5.3.2.1 Amend top-down strategy

This code primarily focusses on strategies formulated and the level of flexibility involved. In many cases, organisations consist of different divisions and departments, yet strategies rarely have one version that can be implemented throughout all of an organisation's different departments. It is thus the responsibility of managers to amend the strategies to their relevant departments.

Participant 8: "*When it comes to execution and implementation, you need to adapt the strategy into the environment that you are operating in*."

Participant 5: "*Our role is to update and maintain the divisional strategy to make sure that we're aligned to the organisational strategy and be keeping up to pace with what's going on around us and adopting all of that into our strategy."*

Participant 3: "*And then I break that strategy into what is it that I would need to deliver from a buying point of view?"*

Participant 5 further established that each division or department within an organisation is different, and strategies need to be amended accordingly.

> Participant 5: *"Stuff like that and so the format is standard, but what goes in divisionally that can be different."*

Participants 6 and 3 also mentioned the importance of not just aligning strategies to their respective departments but ensuring that these are understandable. Different departments have different views and perspectives of the organisation, and middle managers have to take that responsibility.

> Participant 6: "*Understanding what is possible. The art of the possible. I mean building, and then from there building that into the strategy going forward."*

> Participant 3: *"When strategy comes down, I've got to take that strategy, make it palatable, make it understandable, make it achievable into operational plans."*

> Participant 1: "*That idea will come to the team and as a team, we go through the idea validation and when it goes through the process of, you know, like the we call it the discovery process and we see how feasible that is. If it's a big initiative, we will bring in the likes of the consultancy companies like Accenture."*

5.3.2.2 Bottom-up feedback

As these strategies were distributed across the organisations, and in many times from a top-down approach as discussed in the previous section, the following code identifies those instances where feedback loops were created relevant to the communicated strategy. For strategies to be relevant and flexible, sufficient feedback is required to ensure that on-the-ground feedback is adhered to.

> Participant 8: *"Yes, we do give feedback on what works and what doesn't work."*

> Participant 2: *"Yeah, because we can only give them feedback. For instance, there's little influence except giving feedback in terms of saying this thing is not working because of XYZ, you know."*

Participant 9 elaborated on the level of detail that is required from a customer's perspective to ensure strategies are relevant.

> Participant 9: *"I think where we would have an opinion in terms of the ideations stuff where they're actually thinking up, it's when we push up quite a lot of what customer concerns are. So, customers are not happy with our product, our quality so that we would have input in terms of, so this is what customers are saying and then they would sit and then come up and that would be the planning and the idea and putting together the new strategy or the new formula."*

It was also mentioned that these feedback loops have an impact on organisations and how they operate.

> Participant 4: *"So it's not something that's just top driven down given to people you've got in our implementation. They have it both ways. I guess. The process works quite well because also during an implementation, we can say no to that."*

5.4. Results: Research Question 2

RQ 2: How are strategies measured in the South African retail sector?

The research question was designed to investigate how strategies are measured in the South African retail industry. The question is furthermore aimed at exploring how these are identified, defined, and then applied.

The codes derived from the interviews can be divided into two main groups. The first group considers the identification of the measurements, whereas the second group discusses the actual application of the measurements.

The graph below lists the codes found relevant in each of the two groups.

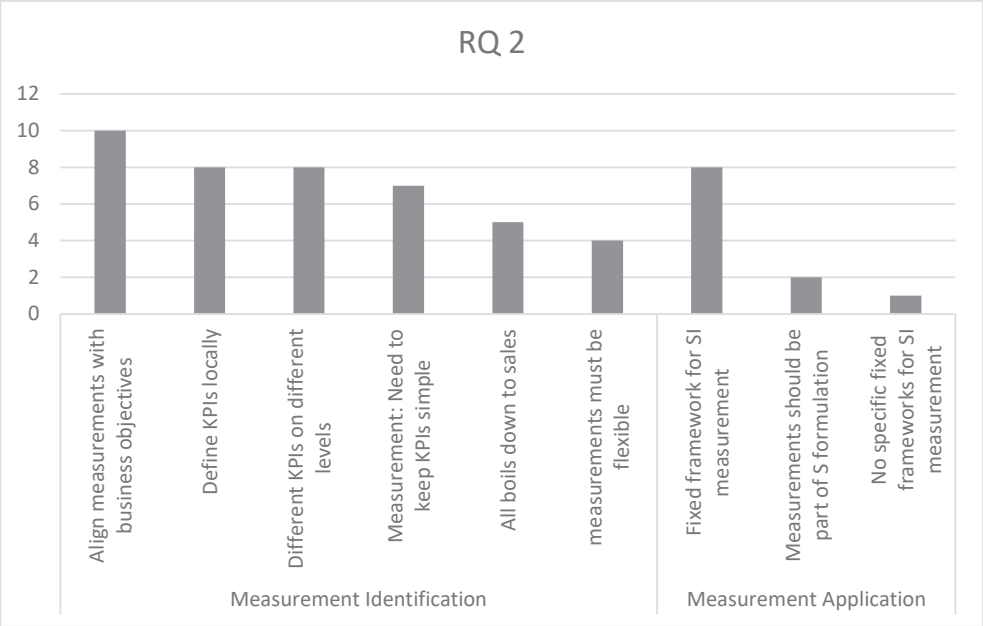

Figure 9: RQ 2 Codes

5.4.1 Measurement Identification

This theme provides all codes gathered from a measurement identification and creation point of view in the South African retail industry. The figure below illustrates a summary of the codes, together with their relevant theme.

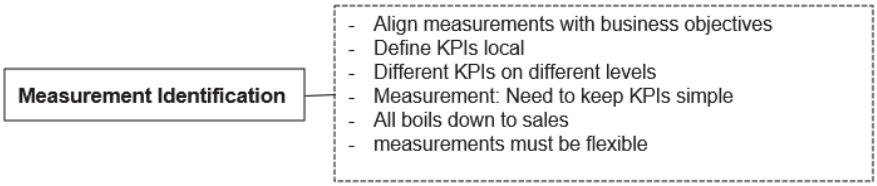

Figure 10: Measurement Identification Theme

5.4.1.1 Align measurements with business objectives

During the process in which measurements are identified, it was noted by the participants that these measurements need to always be aligned to the organisation's goals and objectives. This code captured all relevant data regarding aligning measurements with business objectives.

Participant 8 spoke about the importance of meeting your global and local requirements and aligning your measurements accordingly.

> Participant 8: *"If your local conditions or requirements are less stringent than your global requirement, you have to make sure that the global requirements are met anyway. If your local requirements are more stringent than your global requirements dictate your local requirements."*

> Participant 5: *"We've got to submit what KPIs relate to the strategic objectives that we're trying to achieve, and every quarter those KPIs are reported on, so in itself, that becomes the tool for measuring our progress on executing strategy itself."*

Participant 9 made a comment about how important it is for a team to have a clear view on the direction and objective for which a measurement is created.

> Participant 9: *"And it's only because the people that were inside, they didn't understand where they were going or there was not a key direction."*

Participants also mentioned the importance of being aligned to the company's "north star".

> Participant 6: *"I do think it is important, so you know, especially when these things take up an enormous amount of investment in people's time and it does form part of that 'north star'.... Like you know, we can't just be doing things 'cause it felt like a good idea. I mean if the KPI is so far removed, I've got no influence over it whatsoever in my day-to-day role."*

> Participant 13: *"You start with core business objectives. So, what is the organisation trying to achieve, like what are they? What are their main goals?"*

> Participant 10: *"I bigger picture requires you to slip and trip over your yourself every now and again, and it's far easier to find and fix the problem if you've 'managed to track it."*

5.4.1.2 All boils down to sales

The participants predominantly mentioned the importance of measuring business strategies to sales. Business strategies can either hinder or grow your sales at the end of the day, and in most cases, it was recommended that it can hinder sales.

> Participant 2: "*You know everything that we do is relative to sales."*

Participant 2, in several instances, mentioned the importance of ensuring that the strategy's results can be portrayed in your monthly sales.

> Participant 2: *"Applying these measuring techniques well, if you say you know the majority, pretty much everything boils down to sales… I wouldn't change a lot. You know it was like I'm saying everything should reflect on the bottom line."*

> Participant 3: *"So what is it that you're managing? You're managing sales performance, so how quickly? How much of sales are you going to get out of your business? How much of a profit you're going to make out of your sales so that can be a conversation of whether I need to put more margin?"*

5.4.1.3 Define KPIs locally

This code shed light on the fact that there were measurements being created within each department, apart from just accepting standardised and top-down measurements. These measurements were tailor-made to the specific department to ensure that relevant progress could be monitored.

> Participant 5: "*So we have we have our own operational reports that measure our KPI performance."*

> Participant 2: "*Yeah, so basically, we set our targets and then obviously we divided half yearly, then annually*. *You know, for instance, we will put a measure to say that your wastage cannot be more than, let's say .5% of your sales. You know."*

Participant 6: "*So in a retail environment, you kind of come up with those KPIs and you make sure the guys in charge of the merchandise, for example the merchandise direct systems, have those KPIs that are relevant."*

The participants further elaborated on the systematic approach that is followed during this process.

Participant 9: "*I think even within the KPIs we got to sit and agree on certain key performing indicators, right, on what we need to achieve at the end of the day, but taking it, it should be the part where we sit as a store and say, 'What is it?'"*

Participant 4: "*So while we look at frameworks, we also put our minds to what is material to our business and material to our country and material to our industry. And then we overlay, and we prioritise on the matrix what are we going to focus on strategically that really considers those things?"*

5.4.1.4 Measurements should be part of strategy formulation

In this code, it was noted that several participants confirmed that measurements should be created and defined during the strategy formulation phase. As seen in the previous sub-section, many organisations create different measurements depending on the department the strategy impacts. This code elaborated on this process by stating at what period the measurements should be defined.

Both Participants 5 and 6 stated the importance of identifying these during the formulation phase.

Participant 5: "*The KPIs are part of the strategy formulation process on an annual basis."*

Participant 6: "*You should do it as part of the benefits realisation and in that way you can, as you're justifying for the amounts of money and those sort of like."*

5.4.1.5 Measurements must be flexible

In a volatile industry, many changes can occur unexpectedly, and retailers have to act accordingly. It is thus important to ensure that a structure put out to measure strategies is relevant. Participants provided data on having flexible measurements to ensure relevancy.

> Participant 1: "*Be flexible in in your, you know, in your measurements at the time to be willing to readjust."*

> Participant 8: "*What happens in November might not be the same as what happened in October, so we probably do those comparisons and see if that is we are achieving what we're trying to do in that space."*

Participant 8 further confirmed the positive impact that being flexible can have on the business.

> Participant 8: "*As and when we review them, if something is wrong, it's easy to pick up and also ensure that we go back to the drawing board."*

Participant 2 identified the beneficial impact of transparency and reactiveness to a certain issue by having flexible and relevant measures in place.

> Participant 2: *"What happened, you know, what went wrong? How are you sorting it out? So, we do have those measures."*

5.4.1.6 Measurements must be simple

During this phase of identifying measurements, a question arose as to how many measurements should one have to ensure accurate progress monitoring. This code identified the need within organisations to keep the number of measurements to a minimum.

> Participant 6: *"so I think they're useful, but again, as long as they are simple, they're understandable, and that people feel like there is a direct correlation somehow between what I do and that KPI."*

> Participant 4: "*Tracking various different indicators. I mean we got like over 100 different indicators that we now are busy building and those are all things*

that never existed in the business. So, one of the biggest obstacles is, how do you get that data?"

Participant 3: "*Those are the kind of things that that you look at because those four or five PPIs really is what runs the business at the end of the day."*

Participant 6 also identified the positive impact that a smaller number of measures can have when it comes to reporting and monthly feedback.

Participant 6: "*We just kept the KPIs super simple and once 'we'd gone live and we had done our stuff, we kind of showed those KPIs at the board meetings and in the town hall meetings quite frequently, and what it did was it gave everyone a sense of 'we've done the right thing'. It was the right decision."*

Participant 6: *"But I think it's just something that the CEO of the company is that they need to be so clear on those KPIs and just keep it really, really simple."*

The data showed that having too many KPIs can impact testing and influence focus on the progress of the implementation.

Participant 6: "*So I just, you know, all I'm saying is stay away from doing 1,000 KPIs and are they possible and there's such a granular level that I don't have plans to talk to people in the organisation, you know it has to be something that's actually going to be useful to everyone."*

Participant 11: "*And then the big mistake that mostly when they're testing anything they test for too many things at one time in the same boat. So when the result comes back you can't tell what was the actual major impact of the success or the failure."*

5.4.2 Measurement application

The second theme identified in the data gathered that speaks to Research Question 2 discusses the data that is relevant to the application of measurements within the South African retail segment. The codes identified within this theme are summarised in the figure below.

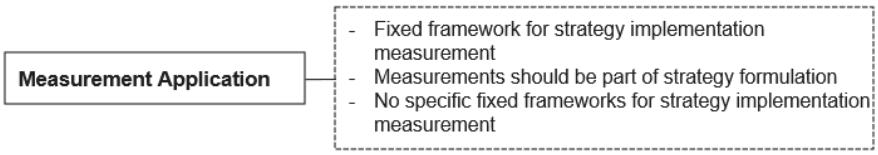

Figure 11: Measurement Application Theme

5.4.2.1 Different measurements on different levels

Measurements that have been created and defined, as per the results in the previous sub-section, need to be applied at some point in time. Participants indicated that during this application period, measurements need to be adjusted to different management levels, depending on the organisation's hierarchy.

> Participant 4: *"So at a group level these KPIs and then obviously as a strategy on a sustainability, we have a number of additional KPIs as a team that we drive as well. And those KPIs have to speak to each other."*

> Participant 4: *"It's got to be made quite clear in our strategy. And then there are at a group level there are KPIs that support the group."*

> Participant 12: "*So there's different KPIs for each and every segment from your directors from the people that are actually leading operational like assets and then you go to stores again, which are just as good as when you come to things like incentive because those KPIs they drive your incentive."*

Participant 12 went even further and provided a breakdown of what the different segments are within an organisation that need to be addressed.

> Participant 12: "*I think if I can say return it can be segmented to three segments, if I may say that in terms of three components. If I can put it that way, you've got your staff which is getting better sitting in there. They are looking in the business in the meeting which we are here to ensure that the*

strategy is implemented and then you put the store people under the under the head of its environment at the other layer you've got your buyers, you've got your planners. You've got all these other professionals like IT, legal systems. And then you've got all those people that are sitting where things are happening, where the actual retail is happening. So the measures or the KPIs are different."

It was emphasised even further that having measurements on different levels can have a positive impact on the organisation.

Participant 13: "*So in organisations, hierarchies are necessary for certain things, and there is a need to know the degree of information and metrics that has to be connected at different levels within the organisation because they have different functions."*

Participant 11: "*If you speak to my CEO, his measurement of success is probably share price. You speak to one below him, he is going to bank the most profits because that will feed the share price."*

Participant 7: "*People focus on different KPIs and metrics which always roll up and that's how we make sure so, so how you think about it is you may have somebody who is one low level metric is a leading indicator and then really not doing very well that that KPI is not doing very well, but ultimately when you roll it up, it's not too bad."*

5.4.2.2 Fixed frameworks for strategy implementation measurement

The sample indicated that with several organisations, a fixed framework is in place to apply and measure a strategy that is being implemented. These frameworks and structures are created internally and then implemented throughout the organisation.

Participant 5: "*The formulation of the strategy divisionally and in the group has been standardised over recent years, so there's standard documentation that gets distributed to the Managing Director of every division So that everybody has to fill in the same kind of document, the same format, the same headings, the same KPIs that need to be listed."*

Participant 3: "*Most retailers, actually almost all retailers, look at a set of metrics that are common across them all.*"

Participant 4: "*There would be metrics that are generic, but then what we do as part of our strategy process is we have a materiality matrix and we then apply our minds on the materiality matrix in relation to these things. You know there are also sustainable development goals that we are expected to report back on.*"

Participant 1: "*What we tend to do is to like high road, medium and low road and we will base it on that, and I think I suppose then you would say if it's below that low road then you will know that you're not going to make money and then therefore it's not going to work. But even so, is there any way you can use it as a by-product?*"

Participant 11: "*Yeah, then it goes through the timelines and through the timeline you should have different KPIs to measure your effectiveness as well as your efficiency. In retail we we've got a pretty standard approach across most of us.*"

Participant 11 and 10 compared it to having a project plan and executing the plan accordingly.

Participant 11: "*So firstly I think it works through the proper normal project plan like people and they estimate.*"

Participant 10: "*I mean, we've got project management tools; we work with JIRA, which allows us to create certain tickets and track those tickets on a Kanban board. So, we can see where projects are. I mean in a workflow scenario, at every step of the way, and it's because it was remarkably handy for us to have a system in place like that.*"

5.5. Results: Research Question 3

RQ 3: How is measuring strategy implementation a potential barrier to successful strategy implementation in the South African retail sector?

The research question aimed to investigate what the outcome has been when organisations have a certain set of measurements in place. The research question was also designed to search for detailed impacts on how the measurements can act as a barrier during the implementation of a strategy.

Figure 12 illustrates the four themes identified from the codes that were gathered during the analysis of the data. These themes include accuracy, alignment, transparency, and individual impact. Each of these will be described in detail in the following sub-sections.

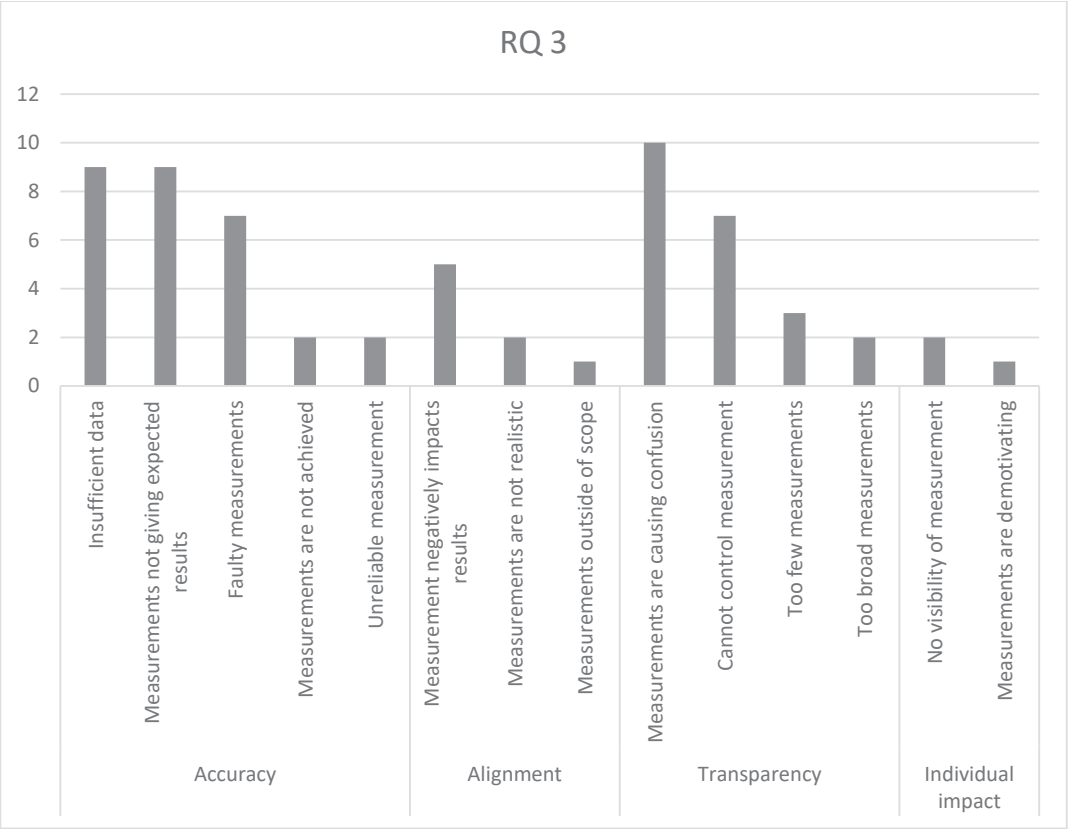

Figure 12: RQ 3 Codes

5.5.1 Accuracy

This theme speaks to the codes gathered under the theme of accuracy. A summary of the codes together with the theme can be seen below:

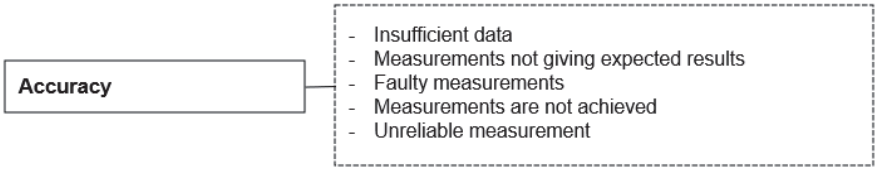

Figure 13: Accuracy Theme

5.5.1.1 Insufficient data

Accurate measurements were mentioned by the participants to be dependent on sufficient data. A lack of data has the ability to question results obtained from measurements. This code specifically talks to the data gathered from the semi-structured interviews and how limited data directly impacts the accuracy of the measurements.

Participant 2 addressed this point by stating the lack of reliability of certain results due to insufficient data.

> Participant 2: *"And we have no new way to prove it…. So already those are alarming points and what is even more alarming is that you can't point it to one aspect."*

Participant 4 described the next steps an organisation needs to take in order to ensure that sufficient data is available.

> Participant 4: *"A lot of times you actually just don't have the data so you gotta build that base."*

Participant 13 further mentioned the lack of forecasting and planning those results from having insufficient data.

> Participant 13: *"We do not have enough data points to understand what is happening today, what happened yesterday and what we could potentially anticipate is going to happen tomorrow."*

5.5.1.2 Faulty Measurements

The next code speaks to the level of accuracy received as a result from having faulty measurements to measure strategy implementation. Participants mentioned the impact that faulty measurements have on business performance.

> Participant 6: ***"****You know these KPIs, you're driving a certain performance that can cause certain behaviour and you can venture in the whole wrong direction."*

> Participant 9: *"Driving that brand, hence they need to be measured to make sure that they are so successful. Otherwise, the brand is going to die like a very terrible death and that happened with quite a lot of brands that led to the strategy to drive it forward."*

> Participant 2: *"You're getting 100 bananas only to find that you're getting 97, you know, and that shortage accumulates over time."*

Participant 6 further elaborated on the importance of the reporting of data, arguing that having a limited view of data visualisation can be insufficient and problematic to the organisation.

> Participant 6: *"Just having the KPI dashboard, I don't think necessarily changes enough."*

> Participant 13: *"If you can't track it, you can't prove it. You can't, you know optimise it. So, it's very important it's crucial to be able to track and measure; to be able to validate."*

It was also mentioned that having too manual processes in place can result in having insufficient data.

> Participant 4: *"It's quite difficult, but I would definitely automate more processes that actually pops up the data in a much more streamlined way than the kind of more manual approach."*

5.5.1.3 Not achieving expected results

The following code highlights inaccurate measures providing unexpected results. Participant 9 spoke to the importance of seeing certain expected results.

Participant 9: *"I would rate it as like the second most important thing a brand needs to do or companies need to do so that they can actually see growth."*

Not being able to make business decisions based on expected results impacts businesses directly. Participants explained the outcome of not being able to act on expected results.

Participant 13: *"Ensure that there is congruence between them, because if the one tells you A and the other tells you Z you have a problem."*

Participant 5: *"Like that and after three years 30 or 40 million Rand later they realised it was the wrong product."*

Participant 4: *"And that they're not disconnected, because I think if they're disconnected, then everyone's running in different directions and they're not really achieving the key goal."*

Participant 4: ***"****So we looked at those and said, 'Oh, the ones that are not material'. I mean if you're mining that you're going to report certain things that we as retail wouldn't support on. So, you strip out things that are not material to your business, and then it's quite constant."*

Participants further elaborated on the importance of responding and taking action on measurements that are providing unexpected results.

Participant 6: *"I think we're doing something in error, and you know you just got to be able to have the guts to stop the entire shot."*

Participant 9: *"And that's a measure that they put in that is managed, for example. But now the problem with that is that I'm not going to be able to stop every criminal that comes and steals."*

5.5.2 Alignment

The figure below summarises the codes identified within the theme of alignment.

Figure 14: Alignment Theme

5.5.2.1 Measurement negatively impacts results

Measurements are created to monitor the implementation of a strategy, thus having the wrong measures in place will impact the organisation negatively. Participants paid attention to the negative impact certain measurements can have on an organisation.

> Participant 9: *"And that almost has a negative impact in terms of our statement, because that loss will register on my personal statement."*

> Participant 13: *"It's critical if we are not keeping abreast of leading and lagging indicators on a constant basis."*

Participants 6 and 10 elaborated on the exact impact these measurements have on their respective organisations.

> Participant 6: *"We're getting a little bit behind waiting to try it a bit harder to do X, Y and Z."*

> Participant 10: *"Either you will beat a project into the ground…"*

5.5.3 Transparency

The following code is related to the impact measurements have on organisations by having limited transparency. One of the key components to successful measurements is being able to track and monitor those throughout the implementation of the strategy. The figure below summarises all codes identified within this theme.

Figure 15: Transparency Theme

5.5.3.1 No visibility on measurement

To measure the implementation of a strategy, one needs to be able to have a clear sight of the measurement itself. Without that, one will not be able to measure progress. Participants mentioned that limited visibility on measurements acts as a barrier to successful strategy implementation.

Participant 6: *"Not having like daily or regular visibility of them will not necessarily break something, it just kind of makes it harder to herd all the cats, you know in a particular direction."*

Participant 10: *"Without tracking it, you won't know how successful it is, but if you're not tracking it, it may not be successful. And you're wasting your time and resources on it. Or you know if you're not tracking it, it just falls away. Just never sees the light of day."*

5.5.3.2 Cannot control measurement

Some participants raised their pain points regarding control over measurements; having little to no control over a measurement acts as a barrier to the success of the implementation.

Participant 9: *"I don't have 100% control over that… End of the day, is it something that I can control? Not entirely. I can control up to a certain extent."*

Participant 12: "*I can't control it. So, in those KPIs are something like you as a person can have an input in there. We have got an influence in that activity and the outcome as well. But some of the things that are market related, which is not which is outside of our scope."*

Participant 4: *"Yes, things happen, that's true. There are things that suddenly obstacles come in your way and then we try and manage that."*

5.5.4 Individual Impact

The figure below summarises the codes identified within the theme, individual impact.

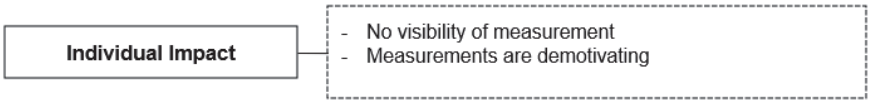

Figure 16: Individual Impact Theme

5.5.4.1 Measurements are causing confusion

It was mentioned by several participants that measurements have caused confusion. Not being able to apply the correct actions or make the correct decisions based on the measurements at hand will have a major impact on an organisation.

> Participant 2: *"It was causing a bit of confusion."*
>
> Participant 5: *"People actually didn't know what to measure."*
>
> Participant 6: *"Some guys might feel like we should have gone east and other guys would have felt they should have gone west."*
>
> Participant 10: *"There's always going to be someone who puts in the wrong measurement or has done their section of the work incorrectly by mistake."*

Participants further expressed their concern as managers are not able to interoperate the measurements due to confusion and are therefore not able to take immediate follow-up steps.

> Participant 6: *"Uh, which one takes priority? So what do you really measure? What's taking the priority, and then?"*
>
> Participant 3: *"Then that KPI will be shifting; you would never be able to peg it down as to whether you call it right or wrong."*
>
> Participant 11: *"So when the result comes back you can't tell what was the actual major impact of the success or the failure of that."*

5.6. Results: Research Question 4

RQ 4: What are the possible reasons for measuring strategy implementation being a potential barrier to strategy implementation?

The fourth research question speaks to a further elaboration and questioning of Research Question 3, which addressed the impact of measurements as a barrier to strategy implementation. Research Question 4 therefore discusses the reasons as to why these measurements are acting as barriers to the successful implementation of a strategy. The graph below lists the three themes identified from the data, together with the relevant codes within each theme.

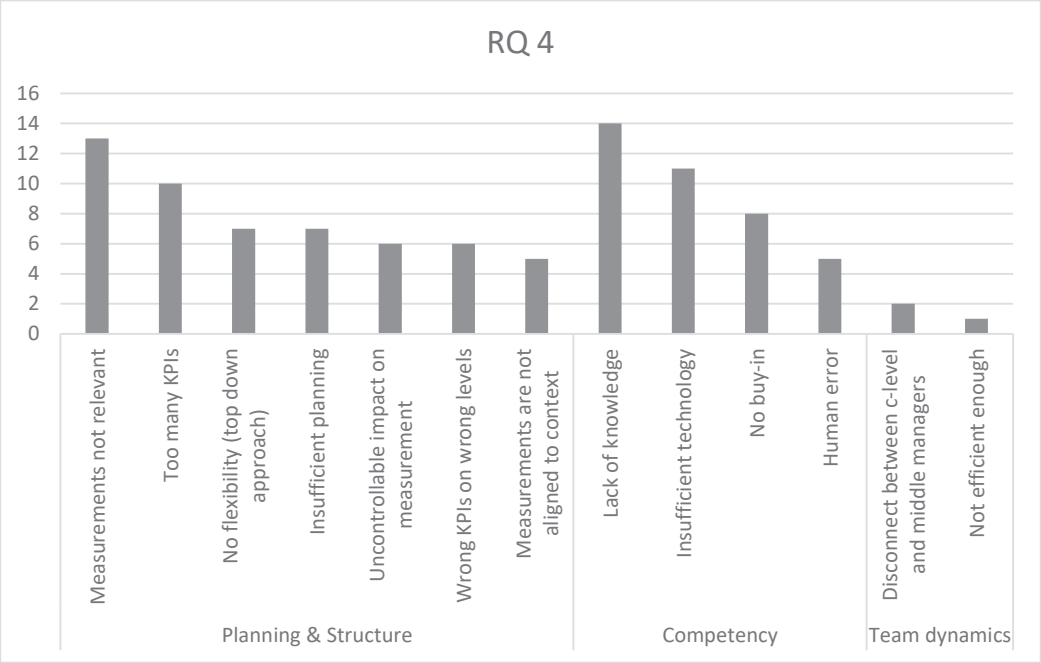

Figure 17: RQ 4 Codes

5.6.1 Planning and Structure

The theme, planning and structure, consists of the themes set out in the below figure.

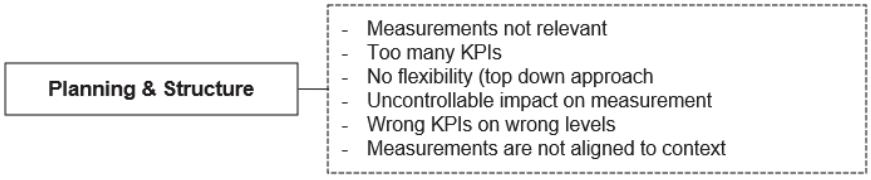

Figure 18: Planning & Structure Theme

5.6.1.1 Insufficient Planning

Measurements should be structured according to certain criteria and preferences in order to be fit for purpose, which requires planning. Participants indicated that a lack of planning acts as a reason for measurements being a barrier to successful strategy implementation.

> Participant 6: *"It should be done up front and whether it's done, it doesn't have to be stupid to be done up front."*

Participant 1 mentioned the importance of considering different potential alternatives when identifying measurements.

> Participant 1: *"You should also, before you call it a failure or what, you need to also look at other ways that the project is helping that you didn't think of before."*

Participant 7 talked about the importance of spending sufficient time on planning what the actual measurements should be.

> Participant 7: *"The only way that you can reduce the error, yeah, it would come at the sacrifice of agility of everything else where you're spending more time thinking about what to measure."*

> Participant 11: *"Implement immediately without testing it. I would say, in my estimation, 30% of the time it's very successful. The rest of it, it actually fails."*

5.6.1.2 Measurements not relevant

It was noted that a measurement should be relevant for the context it is used in. By not being relevant, it can surely impact the implementation. This code encapsulates all data from participants, providing proof of irrelevant measurements during the implementation of strategies.

> Participant 3: *"It's a tough one because you know we spoke about the macroeconomic factors and some of those factors can impact on your KPIs. So, no one saw a hard lockdown coming with COVID. Alright, so you're planning to have stock plan you plan to sell out of your stock. You plan sales and you plan profitability and all of a sudden you found yourself in a hard lockdown with for two or three months, you couldn't sell any items of fashion related and now all of a sudden, those KPIs become almost irrelevant. And your KPI now becomes survival."*

> Participant 7: *"We're completely off or completely irrelevant all the time. There are often times where we realised that the metric that we've been measuring for years actually doesn't really make sense."*

Participant 4: *"It's not metrics that we ever used or sometimes even captured or tracked by the business."*

Participant 9: ***"****So you do get that disconnect now and again. And I think sometimes the disconnect is caused because there's no proper consultation."*

Participant 5: ***"****It's taken about six years to implement a new ERP and the actual implementation time was two and a half years, while the other three and a half years was people previously selecting an ERP, but not having anything to measure their progress against."*

Participant 13 mentioned the importance of technology and its relevance on measurements.

Participant 13: *"If you're not tracking anything, you have a problem. We're in a digital age where everything can be tracked."*

5.6.1.3 Too many measurements

It was mentioned in the previous section that confusion was one of the impacts measurements have on individuals. One of the reasons for this confusion is due to too many measurements being in place.

Participant 5: *"For me, I think the number one thing is simplicity. You wanna think of trying to get everything into one picture and it can be very dangerous. I mean you, you gotta keep it simple, especially when it boils down to all the way to the implementation to your end users."*

Participant 6: *"I have certainly seen where there's probably too many KPIs. All I'm saying is, you know, stay away from doing 1,000 KPIs and are they possible, and there's such a granular level that I don't have plans to talk to people in the organisation; you know it has to be something that's actually going to be useful to everyone."*

Participant 7: *"There's no point in building things too big or too strong."*

Participant 11: *"Too many things at one time in the same boat. So when the result comes back you can't tell what was the actual major impact."*

5.6.2 Competency

The theme, competency, consists of the below summarised codes:

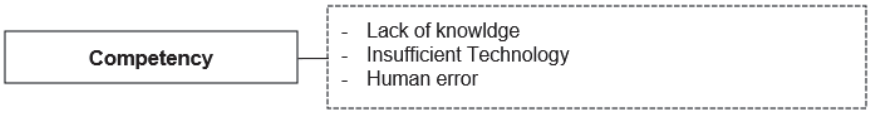

Figure 19: Competency Theme

5.6.2.1 Lack of knowledge

Knowing what to measure and knowing how to interoperate measurements are both key principles to the success of measuring strategy implementation. Participants described their frustration when strategy implementation is affected due to a lack of knowledge.

Participant 9: *"In my view, I feel like the people inside did not either understand the strategy or they didn't buy into driving it, because there is no reason right now that they tell us why it didn't work out."*

Participant 5: *"People actually didn't know what to measure."*

Participant 7: *"Yeah, I think knowing what to measure is really complicated."*

Participant 13: *"I would say the lack of organisational knowledge."*

Participant 11: *"But unfortunately, when you've got a lot of people that have the ability to avoid that which they're not experts on, you gotta be very careful. You're giving a lot of authority to maybe the wrong – putting the authority in the wrong hands in many occasions. So yeah, it's very dangerous."*

Participant 6 mentioned the importance of leadership also needing to understand the measurements in place and having sufficient knowledge.

Participant 6: *"So again, I guess to some extent, it does matter in terms of the leadership, their understanding of it, and their own ability to actually execute the strategy."*

Participant 4 mentioned the impact that a lack of knowledge has due to change management not done effectively.

> Participant 4: *"You need to now capture something, but you never captured before, so there's a change process."*

5.6.2.1 Lack of technology

In data-driven societies, organisations are becoming increasingly reliant on data. A catalyst to sufficient data is technology, which has proven itself to enable organisations to make better decisions. A lack of technology has meant that many organisations are struggling to implement strategies successfully.

> Participant 6: *"There are also nuances of certain things that you just can't measure now. The fact that if you go from, let's say, being in a very arcane system, for example, and then you're suddenly on a digital platform, you might still be losing money. So, someone like Takealot has still not yet turned a huge amount of revenue."*

> Participant 4: *"How do you make sure that there's integrity to the data? How do you then roll it up to analytics and some kind of report format so that you can get views on this information? …I think what technology is at the lower weight and I think the obstacle is it will cost quite a significant investment."*

> Participant 10: *"The type of systems that we have in place, so I'd say I mean a major hindrance to us is a bit of legacy back-end functionality, it often takes slightly longer to implement something simply because we have to kind of work around a lot of old codes and kind of update it."*

5.6.3 Team Dynamics

The theme, team dynamics, consists of the below summarised codes.

Figure 20: Team Dynamics Theme

5.6.3.1 No buy-in

Having buy-in from all stakeholders is crucial for acceptance and buy-in from fellow team members. Without that level of buy-in, strategies will not be motivated and eventually implemented. User buy-in is furthermore excellent for accountability.

> Participant 9: *"They didn't buy into driving it because there is no reason; right now, that they tell us why it didn't work out."*
>
> Participant 6: *"No one could really own it, and I couldn't really drive it. But the question is, do they act like a united front?"*
>
> Participant 1: *"So it's like not having buy-in from every stakeholder. So you need to make sure that you have buy-in, because otherwise it leads to poor implementation towards the end."*
>
> Participant 10: *"No one is actually held accountable for it.*"

5.7. Conclusion

This chapter contains the data and findings gathered from all participants. The findings were divided amongst each research question to provide the required industry insights to each question. Further analysis was done by identifying codes and consolidating these within themes. The next chapter provides a discussion of each theme together with its codes and compares these with the existing body of literature discussed in Chapter 2.

The figure below summarises the key findings from the data collected in Chapter 5.

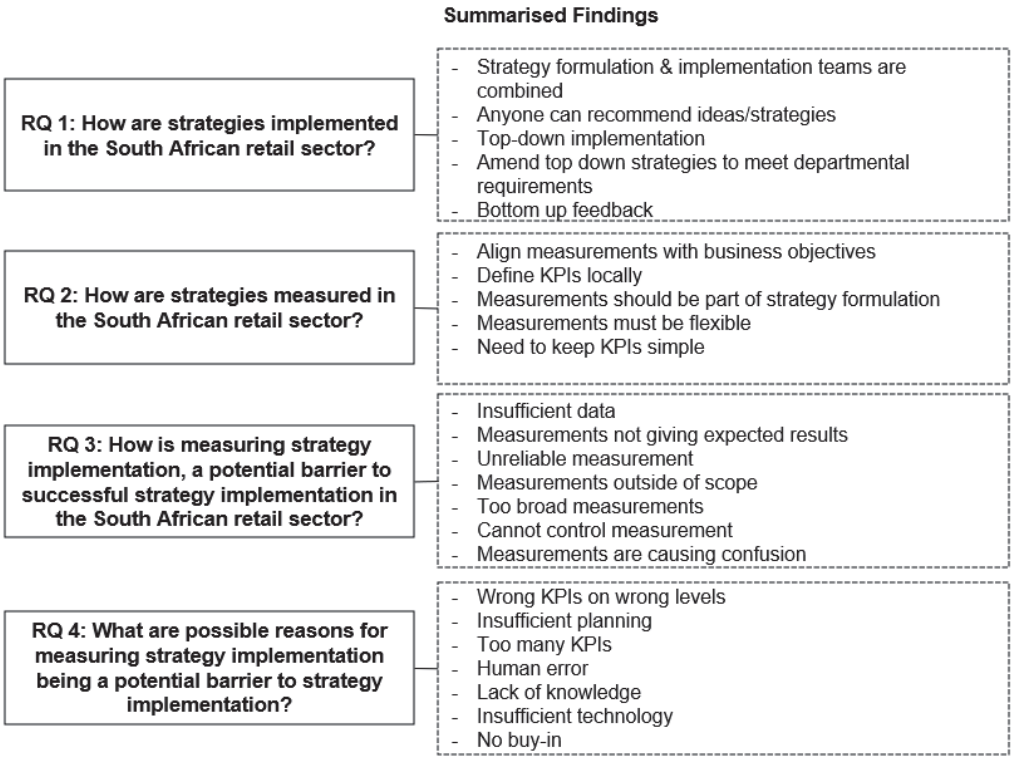

Figure 21: Key Findings

Chapter 6: Discussion of Results

6.1. Introduction

This chapter contains a detailed analysis of the findings presented in Chapter 5. The chapter is further structured to provide sufficient proof and support from Chapter 2 based on the literature review. This section is divided into four sub-sections that each speak to a research question listed in Chapter 3.

6.2. Discussion of Research Question 1

RQ 1: How are strategies implemented in the South African retail sector?

6.2.1 Strategy Formulation

Figure 22: Strategy Formulation Theme

6.2.1.1 Formulation and Implementation teams combined

The literature suggests that sufficient human capital should be involved during the strategy formulation process as it broadens the potential for more ideas (Adobor, 2019). It was further argued by Adobor that open forums are of great importance to ensure that both management and employees are involved and aligned with the final outcome. Zerfass et al. (2018) talked about the importance of communication and collaboration during the formulation process, as greater involvement of stakeholders during the planning phase increases performance (Bryson et al., 2018). The addition of diversity in teams and groups also improves creativity and adds more value to the formulation of a strategy (Paulus et al., 2018).

The data gathered from Section 5.3.1.1 indicated that even though strategy formulation and strategy implementation are seen as two different processes, there has been cross team collaboration to ensure team members are participating in both the formulation and implementation phases of a strategy.

The literature also talks about the importance of increasing collaboration, yet it does not deliberately speak about collaboration between formulation and implementation teams. The data therefore contributes to the literature in Chapter 2 by providing additional insight into the level of collaboration and engagement needed.

6.2.1.2 Formulation and implementation teams are not aligned

The data gathered from Chapter 5 indicated that minority individuals being primarily responsible for strategy execution, claimed that they are not involved in the formulation of strategies but primarily involved with the execution thereof. Fully formulated and packaged strategies are provided to them by senior and executive management, i.e., their role is purely implementation oriented.

This is an additional to the literature, which states that diversity and collaboration increase creativity. Individual collaboration limits the value of creativity during the formulation phase as it avoids the potential of cross collaboration and exploring new thinking (Paulus et al., 2018).

6.2.1.3 Anyone can recommend ideas/strategies

As previously mentioned, there are two distinct processes, namely the formulation and the implementation of strategies. The literature has mentioned that these operated by different teams as well in many instances. The data gathered from Chapter 5 states that there is a third category, i.e., those individuals who are involved in neither of the two distinct categories but still have the potential to influence the formulation process. Campos-Blazquez et al. (2020) defined this as “open innovation”.

Open innovation encourages all internal and external individuals to provide input towards the innovation and formulation processes (Jin et al., 2022). Jin et al. talked about the importance of open innovation, which they defined as the process in which internal and external stakeholders are involved with both the strategy formulation and implementation processes. The data therefore confirms this research in that individuals who are not directly part of a strategy formulation team, has the opportunity to present their ideas and eventually influence the strategy. This also creates a two-way communication between top management and stakeholders,

which results in shared understanding and a much stronger commitment (Abodor, 2019).

The data therefore confirms the literature that open innovation and granting anyone the opportunity to create ideas certainly has a positive impact on the outcome of the final strategy.

6.2.1.4 Top-down influence

The data gathered from the semi-structured interviews suggests that strategies being executed are often impacted and motivated by a top-down influence. This was seen in both South African stores as well as MNCs. The reasoning behind this is to have a certain level of consistency across different stores and outlets when it comes to customer experience. Many participants even phrased this as having a “north star”.

MNCs often face a misalignment between strategy formulation and strategy implementation due to the disconnect between international strategies and local requirements (Lee & Griffith, 2019), however, which can act as a barrier to successful implementation of a formulated strategy. Organisations aims to resolve this misalignment to increase this inefficiency. Profitable customer relationships can be achieved with an MNC’s ability to interact with local customers. Lee and Griffith recommended that MNCs hire local managers who are accountable for informing MNCs about local market changes and requirements.

Structured and effectively planned strategy implementations have mostly utilised top-down approaches and provide a systematic view of the entire process (Weiser et al., 2020). Where structured strategy implementations have been top-down, the adaptive approaches have been both bottom-up and horizontal to ensure cross collaboration, which eventually makes the firm more adaptive (Weiser et al., 2020).

Limited literature is available regarding the top-down influence on the implementation of strategies. The data collected therefore adds to the existing limited body of literature available regarding this phenomenon.

6.2.2 Strategy Implementation

Figure 23: Strategy Implementation Theme

6.2.2.1 Amend top-down strategies to meet departmental requirements

The data gathered from the semi-structured interviews showed that strategies that are implemented across different verticals within an organisation need to be altered and amended accordingly to ensure they are fit for purpose. Further, the formulated strategy must be flexible enough to be implemented across different teams, verticals, and environments.

The literature, on the other hand, mentions that the success of an implementation refers to a firm's ability to ensure consistency between its strategic objectives and its operational actions (Correani et al., 2020). It is this level of consistency that is required throughout each business vertical. The participants' responses mentioned the importance of ensuring that any amended strategy still meets the initial requirements and directly speaks to the main goals and objectives of the organisation and its strategy. Strategy implementation is ultimately the process of translating a formulated strategy into organisational actions (Amoo et al., 2019, Correani et al., 2020), each of which must be linked to goals and sub-goals (Amoo et al., 2019, Alharthy et al., 2017).

The data therefore confirms the literature discussed Chapter 2 by showing the significance of altering a strategy into relevant actions, and ensuring the initial goals and objectives are aligned.

6.2.2.2 Bottom-up feedback

The data captured in Chapter 5 regarding this code states that feedback is required from a bottom-up approach to ensure that strategies are constantly updated and aligned accordingly. This also ensures that strategies remain relevant to their contexts and customers' needs are constantly met. It is through strategic communication that strategy implementation teams will be aligned to the strategy and able to execute it according to the original design (Zerfass et al., 2018).

Jin et al. (2022) raised the importance of open innovation in the sense that customer feedback should be included into any form of strategy formulation, especially when it comes to the process of designing new products. Open innovation is the ability of the right level management to contribute customer feedback towards the formulation. Having sufficient feedback streams within an organisation and further contributes to its adaptability and relevancy (Weiser et al., 2020). It is these attributes within strategy implementation that truly speak to the competitive advantage of an organisation (Jin et al., 2022).

The data gathered therefore confirms the literature regarding the benefits of feedback, strategic communication, and transparency, and how they enable organisations to be adaptive and relevant within the industry.

6.2.3 Conclusion: Research Question 1

The data gathered can be divided into two categories, strategy formulation and strategy implementation. These two categories act as themes, with both containing several identified codes.

The data from the first theme, strategy formulation, has been compared to the literature obtained in Chapter 2. From the analysis, open innovation is a big driver of a successful implementation. Literature regarding open innovation and cross team collaboration exists and is conformed with the data obtained in Chapter 5. Limited literature exists on the importance of top-down influence in MNCs, however. The data gathered therefore contributes to this element.

Strategy implementation, as a theme, contained data regarding the importance of flexible strategies and being able to amend those throughout different organisational structures to successfully implement a strategy. Secondly, the data talks to the importance of critical feedback and transparency. In both cases, the literature existed to support these findings.

6.3. Discussion of Research Question 2

RQ 2: How are strategies measured in the South African retail sector?

This question was designed to investigate the process through which strategies are being measured, as well as to identify how exactly these measurements are created and defined. Radomska (2020) mentioned the importance of being able to identify certain indicators to measure performance.

6.3.1 Measurement Identification

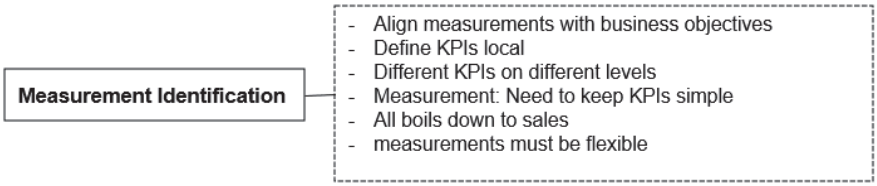

Figure 24: Measurement Identification Theme

6.3.1.1 Align measurements with business objectives

The data captured in Chapter 5 suggests that measurements must be aligned with a business' objectives and values. Han et al. (2019) explained the importance of strategy alignment within business verticals in their research, stating that vertical strategies are best achieved if aligned with horizontal strategies. In this case, vertical strategies refer to those that are tailored to a specific department, whereas the latter refers to organisation-wide strategies.

MNCs should take their primary global requirements into consideration, but still adapt to domestic conditions (Song, 2021). Song added that local requirements should be always aligned with global requirements.

The data gathered therefore confirms the literature, i.e., that the alignment process is of great importance. Managers who are responsible for creating and managing measurements during implementation should be aware of any potential misalignments within their measurements and indicators.

6.3.1.2 Define KPIs locally

As mentioned, measurements are in many cases created during the strategy formulation process. In some cases, the data from the interviews mentioned that measurements are not created during the formulation phase, but rather at the time of implementation. These measurements are also created by managers within each business vertical. This was seen in both South African retail organisations as well as MNCs that operate in the South African retail segment.

The literature suggests that it is the responsibility of MNCs to adapt to a multi domestic strategy to meet the needs of different dynamic domestic markets (Collings et al., 2018). Lee and Griffith (2019) also noted the importance of being aligned to different local markets due to a volatile industry. The data gathered indicated that many departments create and define their own set of measurements. To be aligned, one must be able to adjust measurements locally as well. The literature predominantly focusses on the importance of MNCs aiming to adapt to local conditions but does not state the importance of creating measurements within each vertical. There is also no literature available that is specific to local organisations.

As there is limited data on this topic, the data gathered from the interviews adds to the existing body of literature, which states the importance of creating measurements within each business vertical as opposed to receiving it from a top-down approach.

6.3.1.3 Measurements should be part of strategy formulation

In the semi-structured interviews, participants mentioned that the creation of measurements should be part of the strategy formulation process. Hoverstadt et al. (2020) similarly argued that even though measuring a typical strategy being implemented is the responsibility of the implementation team, it is still the responsibility of the planning team formulating the strategy to ensure that the correct measurement framework and indicators are applied. The existing body of literature on this topic is limited, thus the data gathered from the semi-structured interviews contributes to the literature.

6.3.1.4 Measurements must be flexible

Participants mentioned the significance of being responsive to any challenges or issues arising during the implementation process, as many issues are picked up on during implementation that are related to measurements. An incorrect measurement impacts business and drives the wrong behaviour. Participants further elaborated on the importance for organisations to be able to identify these issues, act on them and adjust the measurements accordingly. This all speaks to a need for flexibility.

The literature suggests the exact same approach, i.e., measurements should be flexible and relevant to the context (Sangwa & Sangwan, 2017). This can be done by ensuring that measurements are adaptive. Being adaptive can be achieved in many ways, but Correani et al. (2020) suggested that this can be achieved by having sufficient feedback information flows to revise strategies. This will also increase the relevancy of measurements. Sangwa and Sangwan (2017) confirmed this by stating that relevancy can be achieved by ensuring that an appropriate amount of flexibility is achieved. The data gathered from participants therefore agreed with the existing literature.

6.3.1.5 Measurement: Need to keep KPIs simple

On multiple occasions, the participants mentioned that complexity within their set of measurements hinders their ability to successfully implement strategies. They also discussed the importance of having fewer rather than more measurements in place, as over-measuring creates confusion and negatively affects employee motivation.

The literature similarly states that complexity should be avoided when it comes to measurements during implementation (Obeidat & Tarhini, 2016). Confusion is one of the key outcomes when measurements lack simplicity, as is poor results (Sangwa & Sangwan, 2017).

The data therefore agrees with the literature in Chapter 2, i.e., measurements need to be simplified to ensure efficient and effective implementation.

6.3.2 Measurement Application

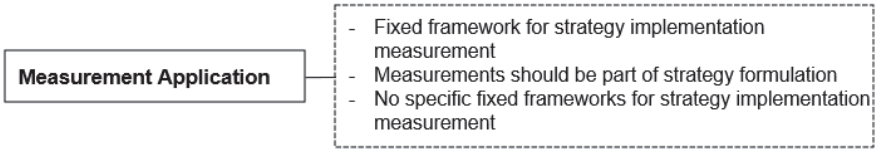

Figure 25: Measurement Application Theme

6.3.2.1 Different KPIs on different levels

Participants mentioned the impact of wrong measurements on the wrong levels, i.e., when considering different hierarchies within organisations, measurements need to be amended and aligned accordingly. In many cases, measurements defined on different levels eventually need to link back to the original goals and objectives of the organisation.

The existing literature is limited in this regard and lacks the depth of knowledge provided by participants. The views and insights from participants therefore contribute to the literature.

6.3.2.2 Fixed framework for strategy implementation measurement

Several frameworks were identified by the participants which are utilised during the implementation of strategies. These frameworks have been designed and created internally within organisations to meet their respective needs.

The literature mentions several available frameworks that have been created specifically for the successful implementation of strategies. A framework suggested by Aziz Dasan (2022) is Kaplan and Norton's balanced scorecard, which is used to address financial and non-financial indicators. De Baat Doelman et al. (2021), meanwhile, referred to Pryor's 5 Ps model, which can be used to measure strategy implementation.

The data gathered from the participants therefore agrees with the literature that frameworks can be used to measure implementation. The data, however, did not provide proof of organisations making use of any of the generic frameworks within

the literature. Each organisation had built their own framework. The data therefore also contributes to the literature regarding the importance and flexibility of being able to design and create customised frameworks to measure implementation.

6.3.3 Conclusion: Research Question 2

Research Question 2 explored the measurement tools and protocols used to measure strategy implementation, with a focus on the South African retail sector. Two distinct categories were identified – the identification and application of measurements.

It was ascertained from the data and the literature that strategies should be aligned with business objectives. The data further suggests that in many cases, measurements need to be defined in different departments, in addition to receiving them in a top-down manner. The limited literature on this topic means that this study has contributed insight towards the literature. Furthermore, the data suggested that measurements should be identified during the planning phase, which also contributes to the limited literature on this topic. Finally, the data indicated that measurements must be both flexible and simple, which was supported by the extant literature.

In the second theme, measurement application, the data indicated the relevance of fixed frameworks being used throughout organisations. The literature supports this by showcasing the frameworks to be applied to assist with measuring strategy implementation. The data also discussed the importance of applying different measurements at the various levels of an organisational structure.

6.4. Discussion of Research Question 3

RQ 3: How is measuring strategy implementation a potential barrier to successful strategy implementation in the South African retail sector?

This question was designed to gather information on the impact that measurements have on the implementation of a strategy and eventually how they act as a barrier. During the semi-structured interviews, the research questions aimed at gaining deeper insights into these impacts and the significance thereof.

6.4.1 Accuracy

The below figure summarises the codes to be discussed in this section.

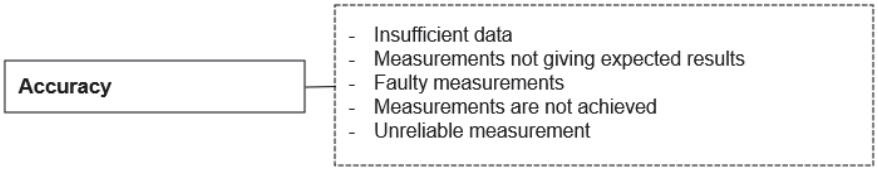

Figure 26: Accuracy Theme

6.4.1.1 Insufficient data

The literature indicates that sufficient and accurate data is required in order to effectively measure an implementation process (Alharthy et al., 2017). Rapp and Salovich (2018) discussed the impact of being exposed to inaccurate and insufficient data, which results in problematic consequences. Furthermore, it leads to confusion and eventually a lack in trust regarding what really is the truth.

The literature also expressed the importance of sufficient data and its impact on accuracy. Participants similarly indicated that insufficient data has tremendous negative impacts on their organisations' ability to measure any progress. Organisations are in a data-driven environment, and not having the correct data or having insufficient levels of data requires extensive manual intervention. This is specifically seen in organisations operating in the digital and e-commerce segments. The data gathered from the semi-structured interviews confirmed this by showing the impact that insufficient data has on the accuracy of the measurements.

6.4.1.2 Faulty measurements

It was gathered from the data collected that many participants had encountered faulty measurements in their respective organisations, which negatively impacted the accuracy of the results obtained. Van Smeden et al. (2019) also mentioned the importance of always having reliable measurements, as inaccurate data will lead to the validity of the data being hampered.

The data therefore confirmed the literature by indicating the negative impact that faulty measurements have on an organisation.

6.4.1.3 Not achieving expected results

In several cases, it was noted by the participants that they had not achieved the results they had originally expected. The literature indicates that validity and reliability are two of the major things that are questioned the moment that measurements do not measure what they were originally designed to (Obeidat & Tarhini, 2016).

The existing literature talks to the confusion created when there is complexity within measurements but does not talk to other forms of confusion. The data retrieved from the participants therefore contributed to the limited literature available on the specific topic of faulty measurements.

6.4.2 Alignment

The figure below summarises the codes to be discussed in this section.

Figure 27: Alignment Theme

6.4.2.1 Measurements negatively impact results data

A negative business impact was perceived by several participants due to the current application of measurements. It was well understood amongst the interviewees that certain measurements can drive behaviour and ultimately performance. Unfortunately, incorrect measures have a negative impact such as stock losses, financial losses, project timelines not being met and loss of control over progress.

From the existing literature, no specific content speaks to these issues, therefore the data gathered from the interviewees contributes to the literature.

6.4.3 Transparency

The figure below summarises the codes to be discussed in this section.

Figure 28: Transparency Theme

6.4.3.1 Lack of measurement visibility

Introducing transparency is one of the first steps needed to improve a measurement; little to no transparency results in the validity of the data and results being questioned. It also limits organisations from identifying threats and being proactive in that regard. Flake and Fried (2020) described limited transparency on measurements as questionable measurement practices.

The data gathered from the semi-structured interviews indicated that a lack of visible and transparent measurements impacts implementation, as there is no way of knowing how and when to act, and how to be proactive when risks arise.

The existing literature has proven to be limited on this topic, thus the data gathered adds to the existing body of literature.

6.4.3.2 Cannot control measurement

Participants raised concerns regarding measurements over which they have little to no control. Their experience has been that the measurements in place are executed, but managers have no influence over them, which causes major risks when it comes to the ability to be responsive to any unforeseen issues.

The existing literature speaks to the importance of having flexible measurements to ensure measurements are responsive, relevant and aligned to business strategy (Correani et al., 2020). In that way, managers have more control over measurements. The literature does not, however, contain any proof of lack of control over measurements being a barrier to the successful implementation of strategies. The data collected therefore contributes to the literature by providing additional insight into barriers to measuring strategy implementation.

6.4.4 Conclusion: Research Question 3

Research Question 3 discussed the three main themes that consolidated the codes from the analysis process. The literature, together with the data from the semi-structured interviews, emphasises how accuracy is impacted by insufficient data, faulty measurements, and unsuccessful results (Ben-Gal, 2019; Rapp, 2018).

The literature furthermore is enriched with the industry insights obtained from Chapter 5 on the importance of measurement alignment throughout the implementation process (Adobor, 2019). Finally, the importance of transparency and visibility (Sangwa, 2017) was discussed, as well as the need to have control over the visibility and transparency of measurements. These factors were both supported by the existing literature.

6.5. Discussion of Research Question 4

RQ 4: What are possible reasons for measuring strategy implementation being a potential barrier to strategy implementation?

The fourth research question elaborates on Research Question 3, which addressed the impact of measurements as a barrier to strategy implementation. Research Question 4 discusses the reasons as to why these measurements are acting as barriers to the successful implementation of a strategy.

6.5.1 Planning and Structure

Below are the summarised codes within this theme.

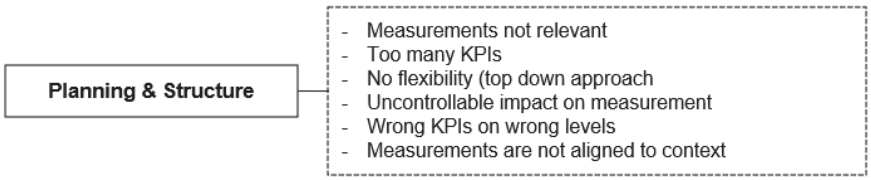

Figure 29: Planning & Structure Theme

6.5.1.1 Insufficient Planning

Insufficient planning is a cause of the failure of the implementation of a strategy and causes tension in the transition from formulation to implementation. Koshtaria (2018) added that this planning should occur during the formulation phase; neglecting this

directly impacts implementation. Organisations lack the ability to be proactive during the implementation phase if there is insufficient detailed strategic planning (Alharthy et al., 2017). Flake and Fried (2020) agreed that it is critical to ensure sufficient planning and alignment if accurate and sufficient data is to be gathered during implementation.

The data gathered from the interviews indicated that insufficient measurement planning played a great role in the unsuccessful implementation of strategies. The participants claimed that undergoing extensive planning reduces the likelihood of major problems that could potentially hinder the implementation. The data therefore confirmed what has been established in the literature.

6.5.1.2 Measurements not relevant

Irrelevancy of measurements was of great concern for many of the participants, however the existing literature does not fully state that irrelevancy amongst measurements has been a barrier to the successful measurement of strategy implementation. The literature does, however, recommend appropriate feedback lines to get sufficient insight from both internal and external parties (Correani et al., 2020). Organisations then have the opportunity to amend their measurements to meet their current needs and contexts, ensuring relevance. Due to this, the data gathered contributes to the existing body literature.

6.5.1.3 Too many measurements

The number of measurements put in place to measure an implementation has a major impact on the success of said implementation, claimed the participants. The majority opinion was that there should be an emphasis on keeping measurements simple, as most of the participants had experienced the negative impact of having too many measurements in their organisation.

Sangwa and Sangwan (2017) and Obeidat and Tarhini (2016) agreed that a lack of simplicity within measurements leads to confusion and unnecessary complexity. Measurements should thus be kept simple to achieve efficiency and effectiveness. The data from the interviews therefore agrees with the literature.

6.5.2 Competency

The below figure illustrates the codes relevant to this theme, competency.

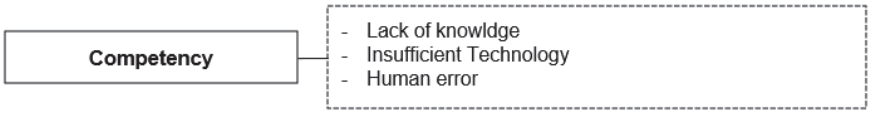

Figure 30: Competency Theme

6.5.2.1 Lack of knowledge

Knowing what to do and know how to do it is extremely important when applying measurements. The participants expressed negative feelings about uneducated individuals who are not able to apply measurements and monitoring tasks due to their lack of education.

The literature agrees with this insight from the participants, stating that a lack of education amongst those measuring an implementation can lead to an unsuccessful implementation (Adobor, 2019; Koseoglu et al., 2020).

6.5.2.1 Lack of technology

A lack of sufficient technology was one of the main reasons given for the unsuccessful measurement of a strategy implementation, according to the study participants. Organisations today rely on sufficient and appropriate data to make data-driven decisions (Ben-Gal, 2019; Rapp & Salovich, 2018), with technology being the main enabler of these types of data. A lack in technology thus slows down the process of measuring and directly impacts implementation. The literature mentions the importance of having sufficient data, especially for those who depend on data-driven decisions. What it lacks, however, is commentary on the fact that insufficient technology can act as a barrier to a successful implementation. This study's data therefore contributes to the existing body of knowledge.

6.5.3 Team Dynamics

The figure below summarises the codes identified within this theme.

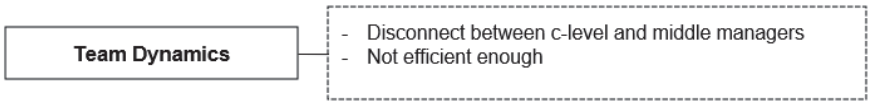

Figure 31: Team Dynamics Theme

6.5.3.1 No buy-in

Little commitment and buy-in to the strategy, its measurements and the means of implementation were seen as potential reasons for an unsuccessful implementation. Participants mentioned that ownership and accountability are two aspects that directly impact buy-in from staff.

The existing literature does not contain any evidence that limited buy-in from employees during the measurement of strategy implementation is a potential reason for an unsuccessful implementation, however. The data collected from the semi-structured interviews therefore contributes to the literature by providing additional reasons for unsuccessful implementations.

6.5.4 Conclusion: Research Question 4

The findings from this research question identified the three main themes, i.e., planning and structure, competency, and team dynamics, that are the main indicators of measurements acting as barriers to strategy implementation.

Chapter 6 is concluded in the figure below. Some of the main themes and findings in Chapter 6 are summarised together with the key topics identified in the literature on Chapter 2 and finally categorised per research question. The impact of each key finding on the existing literature is also indicated.

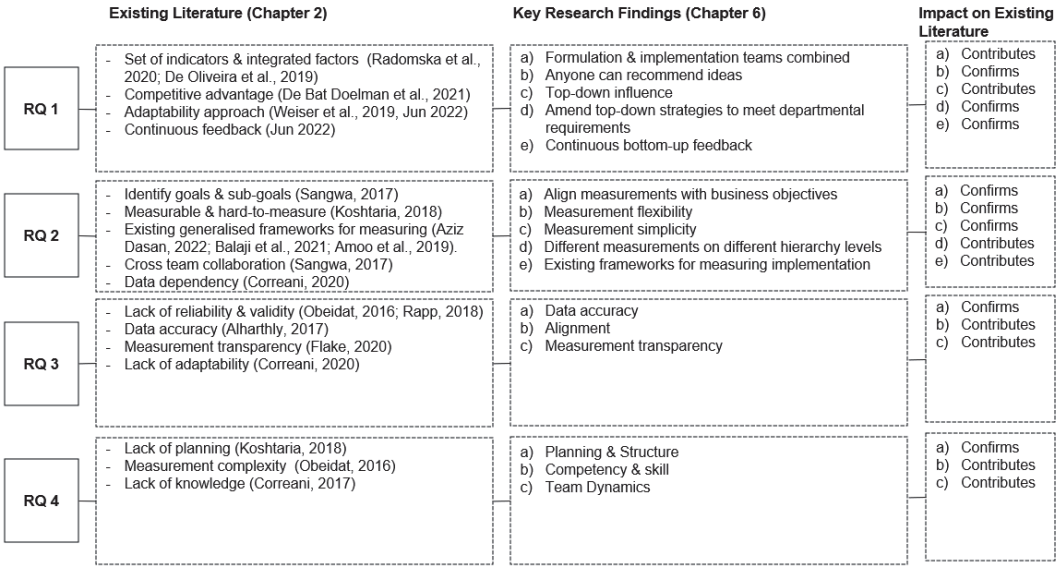

Figure 32: Themes and Literature Summary

Chapter 7: Conclusion and Recommendations

7.1. Introduction

Companies are failing to successfully implement their strategies (Iheanachor, 2022), thus they are continuously trying to enhance and update them (De Baat Doelman, Joshi & Bruggen, 2021). Successful strategy implementation contributes towards an organisation's competitive advantage (De Oliveira, Carneiro & Esteves, 2019), therefore it is critical for organisations to succeed in this. Barriers exist that hinder organisations from implementing their strategies successfully, however (Koseoglu, Altin, Chan & Aladag, 2020). Existing literature has proven that insufficient research has been done on strategy implementation and its potential barriers and enablers (Radomska et al., 2020). Radomska et al. also stated that the literature available on barriers to successful strategy implementation to date are universal and not industry- or even company-specific.

This study predominantly focussed on the impact that measurements can have on the implementation of a strategy when acting as a potential barrier, together with the reasoning behind it. The purpose of this document was to answer the following question:

> *How is measuring strategy implementation a potential barrier to strategy implementation in the South African retail sector?*

This exploratory study identified the significance of measuring strategy implementation and examined how this phenomenon acts as a potential barrier to the successful implementation of a strategy. While many studies have provided industry insight into general barriers to strategy (Radomska et al., 2020; De Oliveira et al., 2019; Amoo et al., 2019), this study explored how measuring as a construct acts as a barrier. Semi-structured interviews were used to collect data from managers within organisations operating in the South African retail sector.

The literature review provided extensive views and detailed arguments regarding the significance of strategies and their formulation, implementation, barriers, measurements, and relevance within the South African retail segment. The literature further explained the different processes and responsibilities of strategy formulation

and the implementation of those strategies. Several aspects and characteristics of these two processes were also discussed.

The literature displayed sufficient evidence of the importance of measuring strategy implementation, however limited literature was available regarding measurements that could potentially act as barriers to the successful implementation of a strategy. The chapter concluded by addressing the South African retail sector and its relevance within the research. Little to no literature is available on measuring strategy implementation in the South African retail sector as well as its potential barriers. This gap clearly identifies the value that this research adds to the existing body of knowledge.

7.2. Strategy Implementation in the South African Retail Sector

Strategy implementation has been neglected when compared to strategy formulation (Aziz Dasan, 2022) and has been found to be more of an exhausting and time-consuming process which contributes towards this negligence (Tawse, Patrick & Vera, 2019). Additional barriers have been identified which hinders the success of strategy implementation (Aziz Dasan, 2022) of which include organizational structure, management capabilities, resource capabilities and communication (Koseoglu et al., 2020). This study focussed on measuring strategy implementation which is considered as a potential barrier to the success of strategy implementation. Strategy implementation has failed on many occasions due to issues with measuring the implementation process (Amoo et al., 2019; Hoverstadt et al., 2020).

To implement a strategy, it needs to be formulated (De Oliveira et al., 2019). Both the formulation and implementation process are equally important to eventually fulfil a strategy (De Oliveira et al., 2019). No research exists on these two important processes in the South African retail sector. This study has addressed this gap looking into strategy implementation as one of the research purposes. Relevant data was collected during the data collection phase and illustrated that open innovation and cross team collaboration are big drivers of successful implementation (Adobor, 2019; Zerfass et al., 2018, Jin et al., 2018). Top-down influence from senior and executive management in MNCs have also shown to have a great influence on the success of strategy implementation in the South African retail sector.

Strategy implementation, identified as a theme during the analysis of the data collection phase, included the importance of flexible strategies and being able to amend those throughout different organisational structures to successfully implement a strategy (Amoo et al., 2019, Correani et al., 2020). Secondly, the data talks to the importance of critical feedback and transparency.

7.3. Measuring Strategies in the South African Retail Sector

Many frameworks have been designed and developed to measure strategy implementation (Amoo et al, 2019; Hoverstadt et al., 2020; Radomska et al. 2020; De Baat Doelman et al., 2021). These frameworks are all a combination of various indicators and identifiers that are selected in such a way to have transparency of the implementation process (De Oliveira et al., 2019; Weiser et al., 2019). These frameworks have been designed to be applied to different industries and contexts.

An exploratory study was carried out to identify the significance of measuring strategy implementation. Research Question 2 explored the measurement tools and protocols used to measure strategy implementation, with a direct focus on the South African retail sector. It is seen that many organisations are making use of frameworks to measure their implementation, however these are not selected from existing generalised frameworks, but rather created custom to the specific context. This insight to measuring strategy implementation in The South African retail industry contributes to the existing available literature.

All strategies should be aligned with a company's business objectives, according to both the data gathered and the existing literature (Han et al., 2019; Song, 2021). The data further suggests that in many cases, measurements need to be defined in different departments, rather than them being transmitted in a top-down manner (Lee & Griffith, 2019). Limited literature on this topic means that the data collected contributed towards the theory. Furthermore, the data suggests that measurements should be identified during the planning phase (Hoverstadt et al., 2020), which adds to the limited literature on this topic. The data also indicates that measurements must be both flexible and simple, which is supported by existing literature (Sangwa & Sangwan, 2017; Correani et al., 2020).

7.4. Measurements as a Potential Barrier

Many studies have provided industry insight to general barriers to strategy (Radomska et al., 2020; De Oliveira et al., 2019; Amoo et al., 2019). This study explored how measuring as a construct acted as a barrier and speaks to the outcome of Research Question 3.

Existing research have identified barriers such as lack of transparency (Flake, 2020), complexity (Sangwa, 2017), inaccuracy (Alharthy et al., 2017) and lack of availability of data as potential barriers to strategy implementation when measuring implementation. Research Question 3 revealed three main themes during the analysis if the data collected in this study. The literature, together with the data from the semi-structured interviews, emphasises how accuracy is impacted by insufficient data, faulty measurements, and unsuccessful results (Alharthy et al., 2017; Rapp & Salovich, 2018; Van Smeden et al., 2019; Obeidat & Tarhini, 2016).

The literature furthermore is enriched with the industry insights on the importance measurement alignment throughout the implementation process. Finally, transparency and the importance of having visibility of these measurements, as well as being able to control them, were discussed. These were both supported by existing literature (Flake, 2020). These industry insights have contributed to the existing gap in the literature on measuring strategy implementation acting as a potential barrier in the South African retail sector.

7.5. Reasons for Measurements Being a Barrier

The fourth research question speaks to the reasoning behind these measurement related barriers hindering successful implementation. The findings from this research question identified the three main themes capturing the reasoning behind this research question. Planning and Structure, Competency and Team Dynamics have shown to be the main indicators of measurements acting as a barrier to strategy implementation.

Insufficient planning can have a detrimental impact on the outcome of an implementation (Koshtaria, 2018; Alharthy et al., 2017; Flake & Fried, 2020); according to the data, it is important to have enough measurements and structures in place (Sangwa & Sangwan, 2017; Obeidat & Tarhini, 2016).

Incompetent employees have been the cause of many unsuccessful strategy implementations, including due to a lack of education and infrastructural incompetence. A lack of appropriate technology also hinders the implementation process (Ben-Gal, 2019; Rapp & Salovich, 2018).

Finally, team dynamics during the measuring process were identified as another reason for unsuccessful implementations. Problematic team dynamics were described as being caused by a lack of buy-in and a disconnect between different teams.

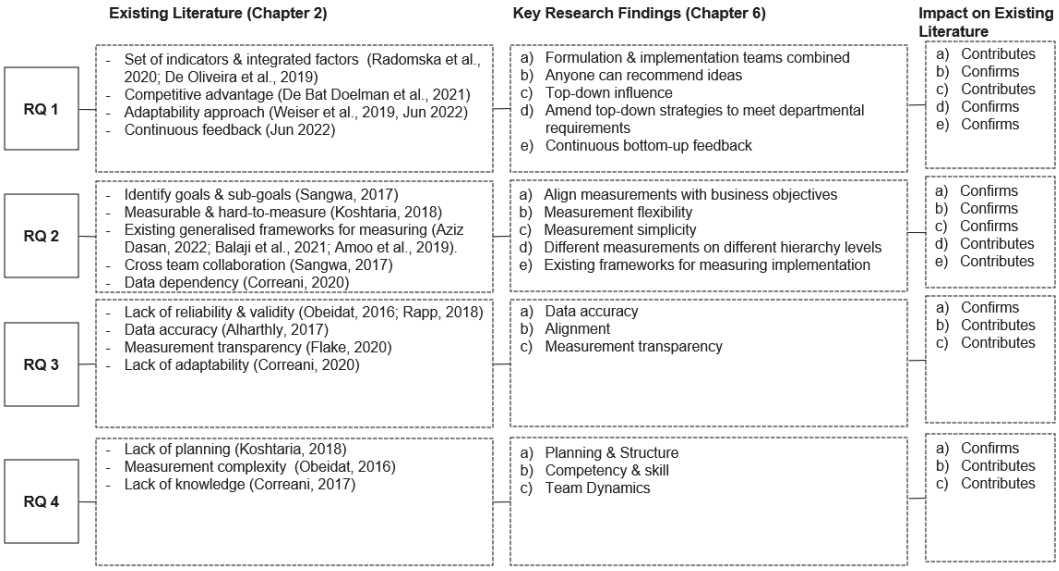

Figure 33: Themes and Literature Summary

7.6. Limitations

During the exploratory qualitative study, the below limitations and areas of potential future research were identified:

- Time horizon: A cross-sectional study was performed, with semi-structured interviews being conducted only once at a given time. Insights gathered from these interviews could therefore be subject to changes over time.
- The interviewer conducting the interviews was not an expert in this role, which might have impacted the results.

- The insights and themes identified from the interviews were only from the perspectives of managers within the relevant companies, which could create a limited view of the actual results of the implemented strategies.
- Language and cultural impact: Participants of different cultures and languages were encountered throughout the process. In many cases, sufficient trust was built first to conduct a successful interview.
- Given the limited timeframe, only 12 to 30 individuals could be interviewed within the South African retail industry. This is a small number of managers compared to the entire potential number of managers within the sector.
- Covid-19 effects: Due to Covid-19, all interviews were held virtually and not face-to-face. Several of these virtual meetings were interrupted due to technical reasons such as loadshedding.
- Company bias: Certain biases might exist due to the limited sampling frame. As only companies within the South African retail sector were approached.

7.7. Future Research

- Further research can be done on other sectors within South Africa.
- As the research was focussed predominantly on the insights from individuals within management roles, future research can include all employees within the South African retail sector to broaden the scope.
- This study is based on qualitative research, which resulted in personal views and insights being gathered. Future studies could include a quantitative measure and analysis on the topic.
- This research is only based on the South African retail sector, thus additional research on international retailers would contribute to the existing body of knowledge.
- Further research can be done on SMEs and start-up organisations to have a comparison on how these compete with larger corporations and how their barriers to a successful implementation might differ.

7.8. Conclusion

This research has provided insights into measuring strategy implementation and how it can act as a potential barrier to strategy implementation. Semi-structured interviews with 13 different participants from 13 South African retail organisations were conducted. The data received during this process was analysed to consolidate different industry insights. Drivers such as alignment, accuracy and transparency within the measuring process were indicated as barriers impacting successful strategy implementation. Further analysis identified poor planning and structures, team dynamics and lacking competency as the main reasons behind the barriers. This study also contributes towards the literature given its comprehensive analysis of strategy implementation, the measurement thereof and its potential barriers.

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Appendices

Appendix A: Consistancy Matrix

Research Question	Literature Review	Data Collection Tools	Analysis Technique
Research Question 1: How are strategies implemented in the South African retail sector?	- De Baat Doelman et al., 2021 - Balaji et al., 2021 - De Oliveira et al., 2019 - Tawse et al., 2019 - Hoverstadt et al., 2020	Qualitative Interview (Semi-structured interview)	Content analysis with open ended questions
Research Question 2: How are strategies measured in the South African retail sector?	- De Oliveira et al., 2019 - Amoo et al., 2019 - Aziz Dasan, 2022 - Iheanachor, 2022 - Koseoglu et al., 2020	Qualitative Interview (Semi-structured interview)	Content analysis with open ended questions
Research Question 3: How is measuring strategy implementation a potential barrier to successful implementation in the South African retail sector?	- Koshtaria, 2018 - Rapp & Salovich, 2018	Qualitative Interview (Semi-structured interview)	Content analysis with open ended questions
Research Question 4: What are possible reasons for measuring strategy implementation being	- Alharthy et al., 2017 - Van Smeden et al., 2019	Qualitative Interview (Semi-structured interview)	Content analysis with open ended questions

a potential barrier to strategy implementation?			

Appendix B: JSE-Listed Retail Companies

	Company	Market Cap	Share Price	
1.	Shoprite Holdings Limited	132.6B	224	.24
2.	Bid Corporation Limited	102.63B	306	.00
3.	Pepkor Holdings Limited	74.68B	20	.20
4.	Clicks Group Limited	68.27B	279	.81
5.	Woolworths Holdings Limited	54.17B	52	.87
6.	Mr Price Group	46.26B	180	.13
7.	The Foschini Group	40.17B	121	.34
8.	Dis-Chem Pharmacies Limited	28.4B	33	.02
9.	Pick n Pay Stores Limited	27.2B	55	.12
10.	Spar Group Limited	25.86B	134	.26
11.	Truworths International Limited	20.96B	51	.19
12.	Motus Holdings Limited	19.93B	111	.90
13.	Italtile Limited	18.5B	14	.00
14.	Steinhoff International Holdings NV	10.93B	2	.56
15.	ADvTECH Limited	9.12B	16	.45
16.	Massmart Holdings Limited	8.14B	37	.14
17.	Curro Holdings Limited	6.44B	10	.77

18.	Cashbuild Limited	6.28B	251	.24
19.	Lewis Group Limited	3.07B	51	.74
20.	STADIO Holdings Limited	2.93B	3	.45
21.	Kaap Agri Limited	2.91B	39	.00
22.	Homechoice International plc	2.61B	24	.50
23.	Combined Motor Holdings Limited	1.94B	26	.00
24.	Choppies Enterprises Limited	847.36M	0	.65
25.	Rex Trueform Group - N Shares	246.51M	13	.75
26.	African and Overseas Enterprises - N Shares	102.22M	10	.00
27.	Rex Trueform Group	56.07M	14	.90
28.	Pembury Lifestyle Group	41.52M	0	.10
29.	Nictus Limited	32.07M	0	.60
30.	African and Overseas Enterprises Limited	26.71M	16	.50

Appendix C: Interview Guide

Research Question	Interview Question(s)
General	1. Can you tell me a bit about your role in your organisation? 2. What role does strategies play within your organisation? 3. What is your current role when it comes to strategy in general in your organisation? 4. How does strategy formulation and implementation differ from another in your organisation, if they do however differ?
RQ1: How are strategies implemented in the South African retail sector?	5. What role does strategy implementation play in your organisation? 6. What would strategy implementation typically look like in your organisation? 7. If you were to consider some of your most recent strategies, were they implemented successfully? And if not, why not?
RQ2: How are strategies measured in the South African retail sector?	8. Are you aware of any measurement tools, frameworks or indicators that is used in your organisation during strategy formulation? And if so, what do you make use of?
RQ3: How is measuring strategy implementation, a potential barrier to successful strategy implementation in the South African retail sector?	9. What have been the outcome of the application of these measuring techniques? 10. Do you foresee any other barriers that could potentially harm your organisation's strategy execution process?

RQ4: What are possible reasons for measuring strategy implementation being a potential barrier to strategy implementation?	11. What could you see as the reason for these measuring techniques not being successful? 12. If given the opportunity, what would you improve on the measuring techniques of strategy implementation within your organisation?

Appendix D: Project Plan (Line-Item View)

TASK	PROGRESS	START	END
Research Project Proposal			
Project Proposal Draft 1	100%	12-Jul-22	17-Jul-22
Draft 1 Submission to Supervisor	100%	17-Jul-22	17-Jul-22
Proposal Rework	100%	18-Jul-22	24-Jul-22
Draft 2 Submission to Supervisor	100%	25-Jul-22	25-Jul-22
Proposal Rework	100%	26-Jul-22	01-Aug-22
Draft 2 Submission to Supervisor	100%	01-Aug-22	01-Aug-22
Proposal Rework	100%	01-Aug-22	02-Aug-22
Project Poposal Submission	100%	02-Aug-22	02-Aug-22
Research Project			
Meeting to discuss Ethical Clearance	100%	08-Aug-22	08-Aug-22
Ethical Clearance Draft Submission to Supe	100%	22-Aug-22	22-Aug-22
Ethical Clearance Preparation	100%	03-Aug-22	05-Sep-22
Literature Review (Ch 2)	100%	12-Jul-22	05-Sep-22
Supervisor Check-In	100%	30-Sep-22	30-Sep-22
Data Gathering and Interviews	100%	01-Oct-22	30-Nov-22
Supervisor Check-In	100%	30-Nov-22	30-Nov-22
Data Analysis	100%	01-Oct-22	15-Dec-22
Supervisor Check-In	100%	02-Dec-22	02-Dec-22
Documentation	100%	01-Oct-22	28-Feb-23
Submission	100%	07-Mar-23	07-Mar-23
MBA Core Modules			
Leadership Assignment #1	100%	03-Aug-22	05-Aug-22
Leadership Assignment #2	100%	03-Aug-22	12-Aug-22
Integrated Business Simulation, Leadership	100%	21-Nov-22	24-Nov-22
MBA Electives			
Negotiation & Dealmaking	100%	07-Jun-22	10-Jun-22
Strategic Finance & Value Creation	100%	24-Jun-22	26-Jun-22
Business Valuation and Deal Structures	100%	29-Jul-22	31-Jul-22
Strategy and General Management #1	100%	23-Aug-22	24-Aug-22
Strategy and General Management #2	100%	06-Sep-22	07-Sep-22
Strategic Agility for Consultants	100%	16-Sep-22	18-Sep-22

Appendix E: Project Plan (Gantt Chart View)

Display Week 1

TASK	PROGRESS	START	END
Research Project Proposal			
Project Proposal Draft 1	100%	12-Jul-22	17-Jul-22
Draft 1 Submission to Supervisor	100%	17-Jul-22	17-Jul-22
Proposal Rework	100%	18-Jul-22	24-Jul-22
Draft 2 Submission to Supervisor	100%	25-Jul-22	25-Jul-22
Proposal Rework	100%	26-Jul-22	01-Aug-22
Draft 2 Submission to Supervisor	100%	01-Aug-22	01-Aug-22
Proposal Rework	100%	01-Aug-22	02-Aug-22
Project Poposal Submission	100%	02-Aug-22	02-Aug-22
Research Project			
Meeting to discuss Ethical Clearance	100%	08-Aug-22	08-Aug-22
Ethical Clearance Draft Submission to Supe	100%	22-Aug-22	22-Aug-22
Ethical Clearance Preparation	100%	03-Aug-22	05-Sep-22
Literature Review (Ch 2)	100%	12-Jul-22	05-Sep-22
Supervisor Check-In	100%	30-Sep-22	30-Sep-22
Data Gathering and Interviews	100%	01-Oct-22	30-Nov-22
Supervisor Check-In	100%	30-Nov-22	30-Nov-22
Data Analysis	100%	01-Oct-22	15-Dec-22
Supervisor Check-In	100%	02-Dec-22	02-Dec-22
Documentation	100%	01-Oct-22	28-Feb-23
Submission	100%	07-Mar-23	07-Mar-23
MBA Core Modules			
Leadership Assignment #1	100%	03-Aug-22	05-Aug-22
Leadership Assignment #2	100%	03-Aug-22	12-Aug-22
Integrated Business Simulation, Leadership	100%	21-Nov-22	24-Nov-22
MBA Electives			
Negotiation & Dealmaking	100%	07-Jun-22	10-Jun-22
Strategic Finance & Value Creation	100%	24-Jun-22	26-Jun-22
Business Valuation and Deal Structures	100%	29-Jul-22	31-Jul-22
Strategy and General Management #1	100%	23-Aug-22	24-Aug-22
Strategy and General Management #2	100%	06-Sep-22	07-Sep-22
Strategic Agility for Consultants	100%	16-Sep-22	18-Sep-22