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169

Eija Kärnä

Strategy

From Managers' Toy to Practitioners' Tool to Successful Implementation

JYVÄSKYLÄN YLIOPISTO

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UNIVERSITY OF JYVÄSKYLÄ

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ABSTRACT

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This dissertation explores the role and agency of middle-level practitioners in the process and implementation of strategy in 14 organizations. The aim is through interpreting the practitioners' emic perceptions to conceptualize their successful role and practices using a constructivist grounded theory process. The theoretical purpose is to add to the body of knowledge about strategic management through increasing our understanding of the successful micro-level strategic activities of mid-level practitioners. The research is a qualitative multiple-case study in order to understand a large and complex working life phenomenon, studied from different but connected angles in five essays using qualitative methods such as semi-structured and narrative interviews and longitudinal action research. The successful role of a practitioner is found to be important for communicating, coordinating, integrating, organizing and facilitating the strategy processes as well as in the processes of sharing and creating knowledge increasing the common understanding of the strategy and the means needed for strategy implementation. In particular, the role of practitioners in supporting functions is found to be crucial when building trust and a positive organizational culture in boundary-spanning, absorptive, exploitive and explorative practices constituting valuable capabilities sought in strategic management research. The results contribute to strategic management research by widening the discussion to micro-level activities and middle-level practitioner's agency in strategy processes and implementation. The practical implication of the research indicates how practitioner potential can be used to develop strategy implementation, results and sustainable success in organizations. Practitioners and managers can benefit from using strategy as a practical tool to make sense of, plan and master their work better for strategic change.

Keywords: Strategy process, strategy implementation, mid-level/middle-level practitioner, strategic practices

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FIGURE

TABLE

CONTENTS

1 INTRODUCTION

Strategy has been the duty of managers and consultants since it emerged in the business setting in the 1960s. The message has been clear enough; employees have been either disinterested or not eager to take on the role of strategy. It is considered too difficult for ordinary people to understand or manage. Strategy has thus, little by little, become the privilege of managers and a precious 'toy' that they hide away to plan, far away from employees or customers. It is no wonder then that the employees do not fully understand strategy, or fail to successfully implement it.

Fortunately times change and today it is largely accepted that strategy implementation is a common problem that can and must be solved in order for organisations to succeed in tough economic times. However, it is not obvious how managers and employees can cooperate in a successful way regarding strategic change. There is also not much research material available covering the combination of strategy and people within organisations. This research attempts to find answers regarding the ways that constitute the successful role of a practitioner in strategic work, and how we can develop the strategy from being a mere manager's toy, turning it into a practitioner's tool.

1.1 The research problem in practice and the gap in research

The research problem in question is that strategy implementation is still a challenge for strategic management research and for organisations in practice. Additionally, it is clear that employees do not fully understand the meaning of strategy to their work. Several studies show that a gap between strategic planning and implementation still exists and, as such, strategic goals cannot be achieved as planned (e.g. Balogun & Johnson 2005; Beer & Nohria 2000; Hrebiniak 2006; Kaplan & Norton 1996a. 2008; Mintzberg 1978; 1990; 1994; Nutt 1999; Sull, Homkes & Sull 2015). The problem has been discussed in research and practice for at least the past 30 years and several respected researchers

(Mintzberg 1978; 1990; Senge 1990/2006; Hrebiniak 2006) have argued that thinking cannot be separated from doing, and strategy formulation and execution cannot thus be separated from one another. However, most strategy research has concentrated on the content of the strategy, external and economic factors, rather than the implementation processes of people (Gavetti & Levinthal 2004; Hrebiniak 2006; Johnson et al. 2003; Mintzberg 1978; Mintzberg et al. 1998; Vaara & Whittington 2012). According to Furrer, Thomas and Goussevskaia's (2008) review of nearly 30 years of strategic management research, performance is well studied at the organisational level. However, as Kriger (2005), Mahoney and McGahan (2007) and Jarzabkowski and Spee (2009) argue, the performance implications of personal relationships and the interplay between people remains largely unexplored. In order to unravel the problem of strategy implementation a more integrative, empirical research, combining strategy and organisation would be needed (Floyd, Cornelissen, Wright & Delios 2011; Gavetti & Levinthal 2004; Mahoney & McGahan 2007; Pryor et al. 2007; Whittington, Molley, Mayer & Smith 2006).

Even though the problem still exists in practice, there are only some strategic management views that recognise employees, according to Mintzberg et al.'s (1990; 1998; 2009) categorising, the *learning* and *cultural* schools of thought. These also mainly see the employees at organisational level and focus on strategy formulation instead of implementation. The *resource-based view* (RBV) (Wernerfelt 1984; Grant 1991; 1996; Barney 1991; 2001) and *dynamic RBV* (Helfat & Peteraf 2003; Regnér 2008; Teece, Pisano & Shuen 1997) are concerned with a person's strategic capabilities and their application, even though the research has most often remained at the organisational level, or focused on managers and top management teams — therefore failing to unpack the *dynamism* in dynamic capabilities theory (Jarzabkowski & Spee 2009). There is a clear need for micro-level empirical studies looking into the activities of people (Johnson, Melin & Whittington 2003; Jarzabkowski & Spee 2009; Vaara & Whittington 2012). At the micro level, the middle managers' sensemaking roles in strategy processes are well documented (Floyd & Wooldridge 1992; Gioia & Chittipeddi 1991; Rouleau 2005; Vaara & Whittington 2012; Wooldridge, Schmid & Floyd 2008), but the role of the employee remains almost totally unexplored (Jarzabkowski & Spee 2009; Mantere 2003; Vaara & Whittington 2012). The *supporting practitioners'* roles in the strategy processes are often ignored or even understated, as research has been mainly interested in core capabilities and external factors.

The latest view of *strategy-as-practice* (S-as-P or SAP) is closer to the actual work and organisational and social practices that enable agency in strategy processes — thus, offering links between strategy and organisation (Vaara & Whittington 2012). However, even though S-as-P is interested in the periphery of the organisations and gives tools to understand employee behaviour, it has mostly seen the employee from the manager's point of view, or at the organisational level, without an attempt to understand the practitioners' everyday activities or the underlying purpose, intentions and feelings of people (Carter, Clegg &

Kornberger 2008; Johnson et al. 2003; Kriger 2005; Mantere 2005). In the field of strategic management, there are even some *critical views* that argue that the discrepancies between managers and employees should be revealed and discourses advanced in order to empower the employees in strategy work as active actors with creative potential (Knights & Morgan 1991; Mantere & Vaara 2008).

The research on *organisational behaviour* has attempted to understand people's behaviour in organisations. However, theory and research have focused historically on management, managers and their influence (Grant & Ashford 2008). *Organisational psychology,* in turn, has addressed more individual than social behaviour in organisations and working contexts, as well as negative phenomena (Cameron, Dutton & Quinn 2009) and loss spirals, rather than positive gain spirals of development (Hakanen, Perhoniemi & Toppinen-Tanner 2008).

Leadership studies attempt to understand how to motivate people, mainly from the perspective of leaders instead of the people themselves. Although better than the mainstream of strategic management research, several streams of leadership studies only come 'half way' to addressing follower perceptions and behaviour in work situations. What is especially interesting, from the perspective of strategy work, are strategic and change leadership, but also e.g. empowering and transformational leadership. Even though empirical evidence shows that leadership helps organisations adapt to strategic change and affect performance substantially, there is only little research on the ways that this can be done (O'Reilly, Caldwell, Chatman, Lapiz & Self 2010). In order to solve complex interdependencies and cooperation in strategy processes, more than managerial actions and economic incentives are needed. There is call for the study of leadership, responsibility and intrinsic motivation from psychological perspectives in the field of strategic management (Mahoney & McGahan 2007). These traditions could cooperate better to find solutions to develop strategy implementation and help organisations to achieve their strategic goals.

There is a growing interest around understanding employees when implementing strategy in the research of *Strategic human resources management* (SHRM) that, until recently, has mainly addressed HR practices rather separated from strategic management or strategy implementation practices (Allen & Wright 2006; Boxall & Purcell 2008, viii-xi, 100; Lepak & Shaw 2008; Wright, Dunford & Snell 2001/2005, 17-35). SHRM, having its origin in personnel management, has grown from a control-based to a commitment-orientated approach to managing people, dealing with 'how the organisation's goals will be achieved through its human resources by means of integrated HR strategies, policies and practices' (Armstrong 2011, 48). SHRM is concerned with the successful strategic choices associated with the organisation of work, the use of labour in firms, with how to make HRM more effective in the firm and how to improve strategic management of human resources (Boxall & Purcell 2000; 2008, 58-59; Salaman, Storey & Billsberry 2005, 1-9), but not expressly addressing the practices of the employees when implementing the strategy.

To summarise, the economic, managerial and organisational oriented strategic management research has insufficiently been able to understand the employ-

ee's role, activities and perceptions in the strategy processes at a micro level in order to understand successful implementation activities. Related streams of research such as organisational behaviour, psychology, or SHRM, have not directly addressed employees' practices in the context of strategy implementation. There are still challenges between 'intentions, actions and outcomes' (Boxall & Purcell 2005, 171-221) and 'disconnections' between a micro and macro level understanding of human capital in strategic management, how it emerges and how to 'own' it (Coff & Raffiee 2015). Hence, the *gap in research* is to constitute an active and successful employee agency in strategy implementation. I explore this agency in the spirit of S-as-P through the 'role' of the employee, in particular a mid-level practitioner, getting its shape from *practitioner's practices and perceptions in the social environment of the organisation*.

The research gap is compiled and presented in Table 1.

TABLE 1 The Research Gap

Research field	**Useful ideas for this research**	**Research gap**
Strategic management		A practitioner's point of view Implementation and organisation
Mintzberg et al., Senge, Schein, Barney, Wernerfelt	Learning and cultural views Resource-based view (RBV)	
Teece et al., Helfat & Peteraf, Regnér	Dynamic resource-based view	
Grant, Nonaka et al., Davenport & Prusak, Cross et al., Wenger	Knowledge-based view (KBV)	
Weick	Sensemaking	
Gioia & Chittipeddi, Rouleau, Floyd, Schmid, Wooldridge, Pappas	Middle manager agency	
Pettigrew, Schendel, Van de Ven	Process view	
Strategy in practice (S-as-P or SAP)	Practice and action orientation, 'strategy is what people do'	A practitioner's point of view
Aaltonen, Ikävalko, Mantere, Carter, Clegg, Jarzabkowski, Spee, Regnér, Rouleau	Middle manager agency and sensemaking	
Vaara, Whittington		
Organisational psychology and behaviour	Understanding of individual angle in a work context	Linkage to strategy work
Kahn, Bakker, Gonzalez-Romá, Hakanen, Salanova, Saks, Schaufeli, Spreitzer et al., Zhang & Bartol	Engagement Empowerment	
Bandura, Ryan & Deci	Self-efficacy/determination	
Cameron, Dutton, Rosso et al.	Intrinsic motivation Meaning of work	
Wrzesniewski et al.		
Leadership	Belief in people's potential	
Argyris, Likert, Ahearne, Rapp, Senge, Schein, Yukl, Lepsinger	Learning, Cultural views Empowering leadership	Linkage to strategy work, a practitioner's point of view
Hamrick, Nadler, Tushman, House, O'Reilly et al.	Change leadership Strategic leadership	
Denis, Langley & Rouleau		
Bass, Burns, Avolio, Dirks, Ferrin	Transformational leadership	

(continues)

TABLE 1 (continues)

Strategic human resource management (SHRM) Armstrong Boxall & Purcel Salaman, Storey, Billsberry Allen, Dunford, Lepak, Shaw, Snell, Wright	Interest in people, human resources, human capital	Partly narrow view through HRM and HR practices

In order to contribute to these gaps in the literature, I chose to root the study in the literature of strategic management, so as to enable a discussion on the role of the practitioner in the strategy process in a managerial and strategic planning-oriented field. I am concerned with the fact that people issues are studied separately from strategy and that valuable knowledge of people's behaviour and perceptions in the fields of organisational psychology, leadership and strategic human resource management does not reach the research on strategic management. Within the scope and possibilities of this single dissertation I cannot possibly detail these essential traditions comprehensively, instead I have attempted to link together some of the relevant findings from the different avenues of literature that recognise the employee in a working context. The literature chosen for the framework of this thesis is presented in Figure 1.

FIGURE 1 Strategic management framework with the relevant linkages to organizational traditions (compare with figure 5)

1.2 Aim of research and the research question

The *general purpose* of the research is to address the problems of strategy implementation and the role of the employees in that, in both theory and practice and to construct an understanding of the mid-level practitioner's role in successful strategy implementation. The *empirical aim* is to explore practitioners' tasks, activities, practices and perceptions in an organisation's strategy processes, with particular focus on the implementation. I attempt to understand and interpret the practitioners' emic perceptions of their possibilities to take an active, empowered and engaged role when implementing strategy and thus, reflect on the antecedents of active strategy implementation. The research commenced by studying employees' activities on a wider scale and gradually shifted toward studying the practices of mid-level practitioners, such as middle managers, assistants, experts and officers, revealing their potential to facilitate in the implementation processes.

The *theoretical aim* of the research is to contribute to the literature on strategy and strategic management through enlightening the employee's agency in the strategy process, and in particular their role in strategy implementation, enlarging the view from middle managers to the often neglected mid-level practitioners, occupying supporting functions. The attempt is to answer the calls for empirical research integrating strategy and organisation in order to understand the practices and perceptions of practitioners when encountering and implementing strategy, as Floyd et al. (2011), Gavetti & Levinthal (2004), Mahoney & McGahan (2007) and Pettigrew, Thomas & Whittington (2002) suggest. The aim is to link the research to current viewpoints of organisational literature which are essential in understanding and interpreting people's behaviour and perceptions in a work context, such as *empowerment* (Spreitzer, 1996; Thomas & Velthouse, 1990), *engagement* (Schaufeli, Salanova, Gonzalez-Romá & Bakker 2002; Bakker 2011), *self-efficacy* (Bandura 2009), *self-determination*, *intrinsic motivation* (Ryan & Deci, 1985; 2000) and *meaning of work* (Rosso, Dekas & Wrzesniewski 2010; Wrzesniewski, Dutton & Debebe 2003). Bridging these closely related concepts is important because in strategic management research they are often treated solely as a goal or outcome but not as the target of research. Correspondingly, it is essential to link the research of these concepts to the research of empowering, encouraging and transformational leadership. This dissertation, however, aims not at gaining a profound understanding of the relationships between these concepts, but rather an overall understanding of the major linkages.

The people and their practices in the processes are the 'black box' that needs to be opened between strategy and organisational outcome, as Van de Ven (1992) states. Hence, the research does not focus solely on the diverse antecedents of strategic activity, though I do need to get a holistic picture of them too. Similarly, the research is concerned with the positive outcomes of the organisations, but the focus is on the practitioners' activity and agency, which are

assumed to affect positively on organisations' outcome. The focus of the research is illustrated in Figure 2.

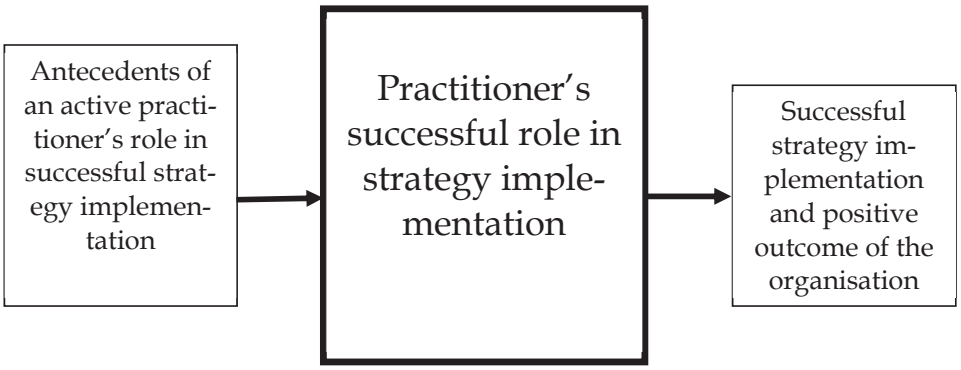

FIGURE 2 The focus and delimitations of the research

The *overall research question* in both this dissertation report and the essays which the report builds on, was formulated as, **"How can a practitioner's successful role be constructed in strategy implementation?"** In every essay I study the phenomenon of the practitioner's role in strategy implementation from slightly different angles in order to get a deeper and broader understanding of the essential elements of this large and complex phenomenon. This report continues on the results of the essays and constructs in an abductive process theory grounded in the empirical data.

The units of analysis are thus: the mid-level practitioners' perceptions of their roles, activities and practices in strategy implementation. By *practitioners* I mean employees in organisations, in particular mid-level employees between top-level management and grassroots level. These practitioners often work in supporting functions as assistants, experts and officers and as middle managers or team leaders. *Successful role* refers to the *perceived successful agency*, i.e. activities and practices of the practitioners when implementing a strategy deemed as successful. Successfulness is evaluated according to both the practitioner's personal perceptions and the organisation members' assessment, through asking participants who in the organisation they believed were known to achieve successful practices in strategy implementation. The evaluator in the organisations was most often a manager in charge of strategy implementation within the organisation, i.e. for example a CEO, strategic manager or development director. In some cases I, together with the practitioners, assessed who carried out successful practices within the organisation. Coff and Raffiee (2015) also suggest assessing human capital specificity for sustained competitive advantage through perceptions in order to unpack the relevant micro-foundations, but with clear awareness of the macro perspective. In this research the micro is reflected towards the macro in the grounded theory process. *Strategy implementation* is both the studied context of the practitioners' practices in strategy work

and the ultimate research problem addressed. These concepts are studied in more detail in chapter 2, 'Theoretical background'. In the methodology section I explain what I mean by *constructing* the role, applying interpretive methods of co-creating the understanding of the phenomena together with the research participants.

According to positivist and quantitative logic it is important to *delimit* the topic and the studied variables clearly, whereas a qualitative approach and grounded theory method demand a rather broad but well-defined focus coming from a real need in practice at the beginning of the research, in order to capture the essential dimensions of the phenomenon in a real-life context (Edmondson 2011; Mahoney & McGahan 2007). The delimitations have been assessed through a sharp focusing on the phenomenon. Focusing on strategy implementation leaves out a large amount of literature on strategy formulation. Similarly, focusing on the employees' point of view makes most of the managerial oriented literature more or less irrelevant. During an iterative process, the focus of the research question narrowed down when the genuinely relevant factors began to emerge from all level employees to *mid-level practitioners* and their strategic practices and successful roles when implementing strategy between top management and grassroots level.

The topic is important for research as it helps interpret the meanings, perceptions and activities of practitioners and gives them a voice as experts in work and implementing strategy in the managerial oriented strategy processes in research and practice. Moreover, Vaara and Whittington (2012) argue that it is important to critically analyse how agency is constituted in a web of social practices. At the practical level, it is essential to understand how to improve cooperation between managers and practitioners and to find ways of making it possible for practitioners to participate whole heartedly in the strategy process and thus, enhance successful strategy implementation and results within organisations.

New solutions are needed to solve the problems of implementation. Rather than focusing on economically measured, short-term performance that represents only the tip of the iceberg, I study socially constructed activities that have relevance for long-term performance and sustainable success through the positive processes of learning, growth and engagement, as suggested by Bakker (2011), Porath, Spreitzer, Gibson and Garnett (2011), Spreitzer and Porath (2012), Robertson, Birch and Cooper (2012), focusing on practitioners' activities. Firm-specific human and social capital really matters as it has been found to relate strongly to performance without significant differences across large or small, manufacturing or service, diversified or undiversified firms (Crook, Todd, Combs, Woehr & Ketchen 2011). As in all social activities, however, it is essential to look at the relationships and cooperation between subjects, i.e. also practitioners and managers in order to attain a balanced view. Like Bakker and Schaufeli (2008), I believe that research that adds to the understanding of people's positive processes in organisations has relevance for positive organisational outcomes.

I also believe, as do Mohrman and Lawler (2012) and Van de Ven (2007; 2011) that to truly add value, research must create knowledge that helps organisations deal with complex problems that are not always dealt with by narrow, single-discipline theoretical knowledge. Instead of a traditional reductionist attitude, breaking down the studied elements into small pieces, the phenomena need to be studied holistically, accepting their complexity, as Barker (2005, 125), Ellingson (2011), Mason (2006), and Piekkari and Welch (2011) state. Widely respected scholars have joined forces to promote *useful research* that advances academic knowledge through 'theories, frameworks and models that accurately reflect and lead to greater understanding, explanation and prediction of individual and organisational behaviour' (Mohrman & Lawler, ed. 2011 2). With my research, I want to be part of this development.

1.3 Personal motivations

My interest in employees' roles and practices in the strategy processes was awoken as a result of my experience and background as a teacher and supervisor of bachelor and master students of management and leadership. My awareness of the research problem grew when interviewing and cooperating in organisations with my students. I experienced the concrete contradictions in strategy implementation; organisations had problems in implementing their strategies and statistics and literature from all over the world highlighted similar problems in strategy implementation, while at the same time I was teaching the people who were supposed to go on to implement strategies in organisations. I felt that I needed to understand how I could encourage my students, and the practitioners in working life, to take a more active role in strategy implementation.

I felt strongly that the problem was a people issue, whereas the traditional strategic management literature had barely mentioned people in the processes. I had also been teaching the traditional strategic management literature to my students and felt that it did not offer the real tools to solve the problem. Hence, I began to reflect on the reasons for the failures in strategy implementation in theory and practice, and study the literature more systematically. My interest in wanting to develop the working cultures and practitioner roles in organisations' strategy implementation guided me to start negotiating with colleagues and organisation members to commence a cooperative research and development project on this topic. More than thirty bachelor and master students and their supervisors participated in the project. We conducted surveys, interviews and concrete development in more than 20 organisations. As a project leader, I collected all the material and edited a research report on all results. The second cooperative project was started in order to better understand the cross-functional cooperation in organisations, being essential in strategy implementa-

tion. Cross-functional cooperation in sales also formed the practical context of the action research in the fifth essay.

Hence, the starting point of my research was mainly practical; I wanted to learn more, understand the phenomenon better and be able to develop better working cultures for practitioners when implementing organisations' strategies. These premises guided me to join a PhD group and commence my studies at Jyväskylä University School of Business and Economics. In order to get a deeper phenomenological understanding of people and practices in the strategy processes and to conduct useful, relevant and rigorous research, I chose a qualitative approach with practical and interpretive lines. I believe, like Mohrman and Lawler (2011 2012) and Van de Ven (2011, 388) that a cooperative and participatory approach increases the likelihood of producing knowledge that advances theory and practice, and like Charmaz (2006, 127-130), that a constructivist interpretive approach, emphasising practices, action and shared experiences with participants, helps to conceptualise and thus, make visible the studied phenomena and the relationships between them — making it possible to see the world from different vantage points and thus change our thinking.

1.4 Research design and the structure of the thesis

The research is based on extensive *preliminary work* conducted as *two* cooperative multi-case research and development projects as part of my work as a teacher, thesis supervisor and project manager at a university of applied sciences. The projects were conducted in cooperation with bachelor and master level students, their thesis supervisors and the practitioners in the organisations.

The *first* project aimed to find ways to develop strategy implementation. A survey of mid-level practitioners was conducted with more than a thousand responses, out of 9000. Circa 40 of the respondents were additionally interviewed. A smaller survey was sent to about one thousand management assistants with ca. 70 answers and ca. 20 management assistants were interviewed. Action research was conducted in more than 20 organisations.

In the *second* cooperative project on cross-functional cooperation between sales, marketing and communications, we conducted surveys and interviews reaching about 400 professionals and managers of sales, marketing and communications. Around 250 sales and marketing professionals answered in a survey where we asked how the practitioners perceived their role as strategic communicators in their organisation. I use these data as background material in this dissertation and have chosen cases and practitioners' roles on qualitative grounds for every essay's research question, to be analysed more thoroughly. During the research process, I also conducted more interviews in the case organisations, in order to get more and deeper information according to iterative theoretical selection and analysis (Charmaz 2006).

The research design consists of this *dissertation report* with grounded theory construction building on *five essays* that explored the phenomenon from different but interconnected angles, to get a deeper understanding of practitioners' roles in strategy processes. The essays are presented in a separate, digital document. The dissertation report summarizes and combines the main findings of the essays to a whole and constructs theory grounded in the data and the extant literature. The overall research design is presented in Figure 3.

The research questions in the five essays organise under the umbrella question of: how a practitioner's successful role in the strategy process can be constructed in strategy implementation. More than the economic outcome, the success refers to individuals' experienced success of the strategic activities and the active, empowered and engaged role in the strategy process.

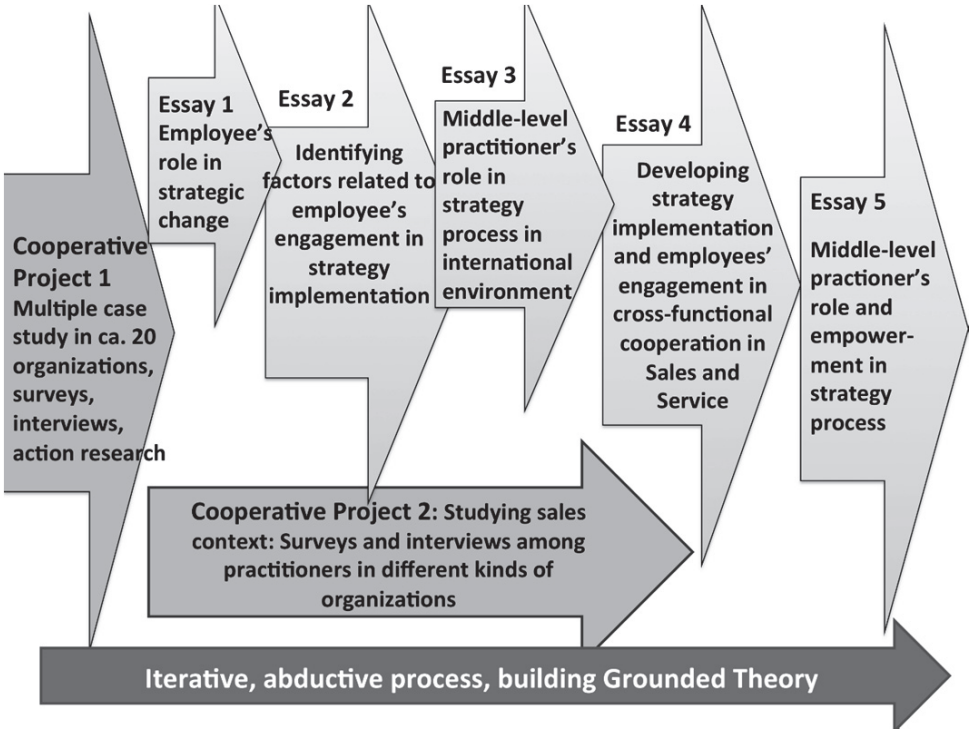

FIGURE 3 Research Design

The *theoretical background* behind the research, the concepts and units of analysis that are common to all essays are discussed in chapter two. The theoretical discussion is dispersed according to the grounded theory logic, as part of theoretical coding.

The *philosophical perspectives* and *methodological* choices are discussed, the empirical data presented and the iterative research process described in chapter three. The different *methods* applied are presented partly in the methodological

chapter and partly separately, in a more detailed way in every essay. The *research process* is reported in chapter 3 and visualised in Table 11, which can be found in the appendices.

The *grounded theory process* and the emerging integrated results are discussed in chapter 4. The results of the research are reflected towards extant theories in chapter 4.6 and the theory generation takes place in chapter 4.7.

The *conclusions* and *evaluation* of the overall research, as well as limitations and ideas for future research, are presented in chapter 5.

Of the *essays* I present in this report the abstracts and main findings. The essays and the methods applied in them are more comprehensively presented in a separate, digital report. The essays have been presented in the following seminars and workshops:

EURAM Doctoral Colloquium, Valencia 2014
11th Workshop on International Management, Berlin 2013,
EIASM Doctoral Seminar on Interpretative research methods, Brussels 2013
Encounters13 Conference, Porvoo 2013 – Passion, flow and transformation
JSBE Summer conference, Jyväskylä 2013
28th Workshop on Strategic Human Resource Management, Copenhagen 2013
EIASM/KATAJA Doctoral Seminar on Qualitative Business Research, Brussels 2013
7th Colloquium on Organisational Change and Development, Bern 2012
EIASM Doctoral Seminar on Doctoral Dissertation Writing, Vilnius 2012
EIASM Doctoral Seminar on Strategic Management, Barcelona 2012

A previous version of the first essay, 'Employee's role in strategic change', was published in 2015 in *Change Management and the Human Factor: Advances, Challenges and Contradictions in Organisational Development*. Dievernich, F.E.P., Tokarski, Kim, O., Gong, J. (Eds.), 2015. Hardcover and e-book. Springer International Publishing.

A previous version of the fifth essay, 'Middle-level practitioner's role and empowerment in the strategy process and implementation', was published in Haaga-Helia University of Applied Sciences, 2014. Haaga-Helia Publication Series R&D Reports.

2 THEORETICAL BACKGROUND

The theoretical background of the study is based on the research of *strategic management* because it addresses the problems of strategy implementation. At the starting point of the research I employed *traditional*, mainstream strategic management literature, based on the Harvardian heritage from the 60s. In this chapter, I briefly review the development of the field from the point of view of my research, scanning the scarce viewpoints concerning people when implementing strategy. The overview is rather wide because of the fragmented nature of the employee's role in the intensely managerial and economic oriented field of strategic management. The process and practice views are studied more profoundly because these underpin action and human agency in strategic management. More interpretative and critical research avenues, like *Strategy-as-practice* (S-as-P or SAP), are examined in order to get tools to understand the practices and praxis of practitioners more profoundly.

The aim is not to isolate the employee from the context of the organisation, but to attain a balanced view of the relationship and cooperation between practitioners and managers. Thus, the literature review searches for links to some relevant perspectives of leadership thinking, organisational traditions and strategic human resource research, in addition to strategic management. However, according to an abductive research process and mainly inductive reasoning, the theorising takes place through the empirical results and the grounded theory process of the thesis report.

The central *concepts* of strategy, strategic change, strategy process, strategy work, strategy implementation, practitioner's role, identity, activity and agency are studied from the point of view of relevant avenues of strategic management research. However, strategic change, strategy process, strategy work and strategy implementation are treated as the *context* of the study.

The *units of analysis* in the research, and common to all essays, are the roles, practices, activities and perceptions of employees, in particular mid-level practitioners between top management and grass-root level.

The review starts with a description of the field of traditional strategic management from the viewpoint of people issues. It continues with process and

practice views and how these define the relevant concepts in the field. Communication is studied because it emerged as the most essential factor for the employees' role in strategy implementation, already during the pre-work phase of the research. Managerial activity in the strategy process is additionally examined because of its elementary role in a balanced cooperation relationship when implementing strategy.

2.1 The field of strategic management

The *foundation* for the research on strategy and strategic management is concerned to rely on the work of Chandler, Ansoff and Andrews from the 1960s, based on the work of Barnard in the 1930s, Selznick and Penrose in the 1950s — as stated in the reviews of Clegg, Carter, Kornberger and Schweitzer (2011), Furrer et al. (2008), Hoskisson, Hitt, Wan and Yiu (1999) and Pettigrew et al. (2002). Chandler's early ideas on strategy and structure (Chandler, 1962/1990) and long-range planning, Ansoff's systems perspective and separation of strategic and operational levels of action (Ansoff 1965), and Andrews' separated strategy formulation and implementation (Andrews, 1969) — still dominate the discussion (Clegg et al. 2011; Furrer et al. 2008; Hoskisson et al. 1999).

The *central aim of the field* is to explain and predict the *performance* of organisations embedded in their environment from analysis to the diagnosis of strategy formulation to implementation (Hoskisson et al. 1999; Mahoney & McGahan 2007). However, the main interest has been on economic performance (Furrer et al. 2008; Vaara & Whittington 2012). According to Nag et al.'s (2007) inquiry with 57 scholars, an explicit definition of strategic management lies mainly on the basis of 'strategic initiative', 'firms' and 'performance' but also on 'environment', 'internal organisation', 'managers and owners' and 'resources', while the implicit deals with 'the major intended and emergent initiatives taken by general managers on behalf of owners, involving utilisation of resources, to enhance the performance of firms in their external environments'. Of the main explicit objectives 'performance', 'internal organisation' and 'resources' touch the employee's role most but do not address the employee directly and the implicit definition forgets the employees as individuals.

The consensus of the dominant paradigm of legitimated, top-down control systems oriented towards effective and efficient performance, specified by top management has been criticised by many strategic management scholars, among the first was Mintzberg (1978; 1990) and thereafter, in particular by Huff and Reger (1987), Drucker (1992), Pettigrew (1992), Schendel (1992) and Van de Ven (1992). The criticism initiated by Mintzberg was welcomed as an effort to humanise the strong economically dominated field, especially by process and practice scholars (Clegg et al. 2011; Pettigrew et al. 2002, 12). Mintzberg's work has also been valuable for this research because of a new opening, the emphasis on the learning processes of organisations in strategy work and for the compre-

hensive approach in attempting to scan the different streams of strategic management. Consensus increases the identity of the field but can simultaneously increase biases to new openings (Nag, Hamrick & Chen 2007) that a focus on people issues would mean. Nag et al. (2007) further argue, however, that the future success of a field, depends on how dynamic, flexible, adaptive and willing it is to cooperate with other academic fields. Moreover, the field has been criticised for its US domination, limited attention to critical views and its narrow epistemological view of methodology (Clegg et al. 2011; Pettigrew et al. 2002; Vaara & Whittington 2012).

The research on strategic management has swung from an early focus on *internal* resources to one on *outside* resources in the 1980s, then back to inside resources and people, with the rise of the *resource-based view (RBV)* in the 1990's (Hoskisson et al. 1999). The RBV has offered a counterbalance to the mainstream ideas, even if the Industrial Organisation (IO) economics and Porter's view of strategy as positioning and competitive advantage as environmental factors from the 1980s became far more influential (Hoskisson et al. 1999; Pettigrew et al. 2002, 6). Moreover, RBV provided a framework and conceptual basis to link human resource issues to business strategy, and became the most commonly used theory in the field of Strategic Human Resource Management (SHRM) (Boxall & Purcell 2008, viii-xi, 100; Wright, Dunford & Snell 2001/2005, 17-35). However, as the authors state, research between the fields has not been sufficiently addressed, even though the field of SHRM is growing rapidly (Allen & Wright 2006; Lepak & Shaw 2008).

The RBV was started by Penrose in 1959, who stated that firms had productive capacities that create resources (Clegg et al. 2011, 85; Hoskisson et al. 1999). RBV was expanded by Wernerfelt (1984), Barney (1991; 2001) and Grant (1991; 1996), which established it as an important part of strategic management research (Pettigrew et al., 2002, 7). According to the review of Furrer et al. (2008), Barney's seminal 1991 article on firm resources has been the single most influential strategic management article since the 1980s. Also frequently cited is the Wernerfelt's related resource-based view from 1984 (Furrer et al. 2008). However, the discussion Wernerfelt and Barney started on the importance of internal resources has also been strongly criticised, by Priem and Butler (2001) for example, for not being useful because of tautological reasoning and unclear causality. Furthermore, RBV and cultural research have been criticised for encouraging rooted capabilities and stagnation, but as Huy and Mintzberg (2003) and Mintzberg et al. (2009, 298) argue, stability to some extent can be needed in the continuously changing world. Barney (2001) himself admits the lack of dynamicity of RBV.

Most scholars agree on that understanding and managing *both* the internal and external resources is needed. As Ulrich and Lake (1991) argue, the external demands need to be translated to internal structures and processes supporting the organisation members to create organisation specific competences that are critical for the organisation's capacity for sustainable competitiveness. Peteraf (1993) even advocates RBV for being a unifying theory and a robust tool with

power and implications for many important questions for both strategy researchers and practitioners, having the potential to integrate research in all areas of strategy. Furrer et al. (2008) propose moving from RBV towards an appreciation of more *dynamic* and *innovative* capabilities and an integrating view between the different academic influences in the field of strategic management. A more dynamic view of resources is also embraced in this research, believing like Peteraf (1993) in the unifying potential of RBV, standing as a solid foundation to build upon also when studying a practitioner's role in the strategy process.

The *Dynamic resource-based view* develops this ground further, sharing similar assumptions as RBV but demanding not only managing but building, utilising, deploying and redeploying capabilities in rapidly changing environments (Teece et al. 1997). The dynamic RBV view is concerned with phenomena that are essential for employees encountering new strategies like adaption, learning and change processes though building, integrating and reconfiguring resources and capabilities to achieve new and innovative forms of competitive advantage (Helfat & Peteraf 2003; Teece et al. 1997). Furthermore, the dynamic perspective links RBV e.g. with the knowledge-based view (Helfat & Peteraf, 2003; Teece et al., 1997). Interestingly, Mintzberg et al. (2009, 293) categorise RBV as part of the cultural school, and dynamic RBV as part of the learning school of thought of strategic management research. This is because the RBV emphasises the rooting of the capabilities in the evolution of the organisation and in its culture, while the dynamic capabilities approach emphasises *development,* essentially through a process of strategic learning. This categorising is motivated but concurrently shows the fine-drawn differences between the RBV related perspectives.

Learning, closely intertwined with dynamic RBV, is a powerful and interesting avenue of research to study the employee's strategic role concerned with knowledge creation processes. The learning view sees these processes as complex and dynamic, as also the development of capabilities and innovation (Hoskisson et al. 1999). Understanding of organisations as *learning systems* dates back to Cyert and March's behavioural theory of the firm, from the 1960s. Argyris and Schön's ideas from the 1970s and 1980s extended this and were continued with Senge's (1990; 2006) *learning organisation,* in which the whole organisation learns when the individuals learn. Moreover, Mintzberg and Waters (1985) underline a collective process of strategic learning and an organisation's capacities, rather than solely managerial thinking. Influential has also been Cohen and Levinthal's (1990) contribution on learning and *absorptive capabilities,* depending on individuals who stand at the interface of either the external environment or at the interface between subunits within the firm. Current research benefits from the recent evolution in the field of strategy towards a more situational integrative perspective, combining sociological and economic views and emphasising the importance of organisational learning, knowledge flows and dynamic capabilities (Gavetti & Levinthal 2004). As well as that of practitioners' role in boundary-spanning positions in the learning processes (Cohen & Levinthal 1990).

The discussion of *knowledge-based view (KBV),* first initiated by Polanyi's explicit and tacit knowledge in the 1960s, is closely related to RBV, but it was more dynamic, linking the resources to the dynamic processes of interaction, learning and innovation (Grant 1996; Hoskisson et al. 1999; Kogut & Zander 1992). Opposite to the economic strategy research, KBV is concerned with human resources, examining the interaction of tangible and intangible resources (Hoskisson et al. 1999). The idea of attending a knowledge-based organisation as everyday work so as to allow effective knowledge application and creation processes began to emerge in the 1980s, for example with the work of Drucker (1998; Clegg et al. 2011). Grant (1996) argues that whilst organisation theory has focused upon hierarchy and vertical processes as the basic structure for organising social activity, KBV is interested in knowledge integration at all levels of the organisation, even down to the micro-level. The practitioner-level knowledge integration processes that are external of the hierarchical channels, are also examined in this research.

Nonaka's (1994) *dynamic theory of organisational knowledge creation* emphasises the organisation's role in articulating and amplifying the knowledge that individuals create. A year later, Nonaka, together with Takeuchi, constructed the model of the *knowledge spiral* that, according to Dalkir (2011, 71), has proven to be one of the more robust in the field of knowledge management, even though it has had its critics. The spiral model describes how organisational knowledge is created through a continuous dialogue between tacit and explicit knowledge, through processes of socialisation, externalisation, combination and internalisation (Dalkir 2011, 64-71; Mintzberg et al. 2009, 225-227). Nearly ten years later, Nonaka and Toyama (2003) argue that knowledge creating processes are still not understood because of their dynamic nature, combining micro and macro, part and whole, tacit and explicit, mind and body, self and other, as well as creativity and efficiency. Because the mid-level practitioners have tacit knowledge creating practices in all the phases of the strategy implementation process, the knowledge spiral can be applied to explore and interpret these practices. This discussion is part of the grounded theory process in this report.

From the same premises with KBV orientates *knowledge management* (KM), originally defined by Nonaka and Takeuchi (1995) as, 'the process of applying a systematic approach to the capture, structuring, management, and dissemination of knowledge throughout an organisation to work faster, reuse best practices, and reduce costly rework from project to project' (Dalkir 2011, 3). Clegg et al. (2011, 104) define KM as a managerial practice that seeks to identify, leverage, control and create knowledge in an organisation. Of these definitions Nonaka and Takeuchi's (1995) way of seeing the processes more as the whole organisation's processes is more applicable when studying practitioners' knowledge creating processes when implementing strategy. More than one single theory, KBV and KM represent *multidisciplinary views,* having roots in several traditions parallel to organisational sciences (Dalkir 2011, 2-11), responding better to the complexity of the phenomena.

Alongside with KM, also *change management* can be regarded as a strategic management approach deeply concerned with both strategy and the organisation. However, change management is more related with operational activities that have traditionally not been regarded as 'strategic'. The field has been concerned with managers' actions and traits, and linear models to manage operational activities in strategic change. Perhaps the most influential change model has been Kotter's eight-step model from 1995. Rather than subjects, employees are seen as objects that need to be managed as a resource, e.g. dealing with change resistance, as in Kotter and Schlesinger's research from 2008. However, as Kotter (2012) also states, the field of change management is altering in this rapidly evolving world where old hierarchies and methods can no longer handle rapid change.

The *core competence* of the corporation and less tangible assets of Prahalad and Hamel (1990), has also had an enormous effect on the discussion of strategic management (Mintzberg et al. 1998; 2009). The research on intern capabilities has been influential, but the criticism has targeted the problems of observing, measuring and generalising the capabilities. The research on capabilities at the micro level, concerning other members of the organisations, has occupied a minor position in the field. As Hoskisson et al. (1999) and Gavetti and Levinthal (2004) state, it is important to answer the challenges of practical problems in order to understand performance through varied theoretical perspectives, methodologies and paradigms.

According to Hoskisson et al. (1999) closely related to RBV is *strategic leadership*. However, as discussed in Hamrick's work in the 1990s, it mainly focuses on top managers', management teams, governance bodies, managerial activities, cognition and decision-making, without a dialogical view or encountering with the other members of the organisation. Strategic leadership never became a big issue in the field of strategic management, even though it could offer means to solve the perennial problem of strategy implementation if developed towards more interactive lines. However, the research of strategic leadership has continued in the field of leadership, identifying strategic human and social capital for collective performance such as mutual trust, commitment and identification with the organisation, as well as flexible and adaptive leadership practices (Yukl & Mahsud 2010; Yukl 1999; Yukl 2012; Schoemaker, Krupp & Howland 2013). *Transformational leadership* is another stream of research that also deals with people in change processes (Dvir, Avolio & Shamir 2002; Yukl 1999). Unlike traditional leadership theories emphasising rational processes, transformational leadership emphasises emotions and values and a leader's empowering activities in helping to achieve important objectives. There are, however, challenges in understanding the underlying influence processes that are socially multilevel, instead of simple dyadic relationships as Yukl (1999) states.

2.2 A process and practice view on strategic management

In contrast to the mainstream strategy-content view, the *strategy process research* underlines the processual character of strategy, combining the content and the process, emphasising action and both individual and collective human agency (Pettigrew 1992). During a very planning-oriented period of strategy research Mintzberg (1978; 1990; Pettigrew et al. 2002, 8; Clegg et al. 2011) was among the first to negate the rational, separated processes of planning and implementing strategy, suggesting a grassroots model of strategy as a learning process of all organisation members and thus, also taking account of the employees in the processes. Pettigrew (1992) and Schendel (1992) criticised the traditional planning oriented view for seeing decision-making processes as independent of the implementation processes, arguing that the separation of content, process and context is artificial. Furthermore, Huff and Reger (1987) called for simultaneous attention to both strategy-content and the overall process. Van de Ven (1992) and Pettigrew et al. (2002) criticised strategy process research for its linear perspective of the processes and focusing on the input-output models, only explaining causal relationships without opening the 'black box' of processes.

Even though process research has attempted to understand the sequences of events, activities and stages describing strategic change, it has, according to Kriger (2005), neglected essential psychological and social dimensions and the degree to which tacit knowledge is embedded within organisational routines. Pettigrew et al. (2002, 10-11) argue that since the 1990s there has been a clear trend in the field to seek cross-fertilisation and complementary scholarly development, and from the employee's perspective, the field has been enriched with sociological and psychological insights. Much of the critical and more reflexive theory originates in Europe, and the rise of multiculturalism has increased the awareness of the diversity of strategies, systems and cultures of organisations requiring dynamic approaches to the research (Pettigrew et al. 2002, 14-19)

The practice-based view is particularly fruitful from the point of view of studying an employee's role in strategy processes as it underpins a variety of strategic actors in organisations (Jarzabkowski & Spee 2009; Regnér 2005, 24; Vaara & Whittington 2012) with their emotions, motivations and tacit practices involved in strategizing (Jarzabkowski, Balogun & Seidl 2007). Drawing on the process approach and several social sciences, rather than economic theories, Strategy-as-Practice is important both for a theoretically grounded critical reflection and for practical relevance, deepening our understanding of strategy-making in organisations and social environments (Vaara & Whittington 2012). The focus of the S-as-P paradigm lies between organisational macro structures and individual activities and agency in strategic practice (Mantere 2005). The people point of view benefits from the origins of SAP research in social sciences, for instance in the practice perspective of Wittgenstein and Heidegger, in the philosophy of Foucault or Giddens, the anthropology of Bourdieu, the activity theories of Engeström, as well as ethnomethodology and discourse analysis

(Vaara & Whittington 2012). In addition to the philosophical origins, it can be argued that the practice-based view brings the research of strategy partly to its premises, as the research in the strategic management field started with a more practical and empirical approach, integrating strategy and organisation. SAP is also linked with well-established research avenues in the field of strategic management, such as Weickian sensemaking and the dynamic capabilities perspective (Vaara & Whittington 2012).

Hence, S-as-P has reinstated the focus of strategic management research back to a micro level and human beings (Jarzabkowski 2004; Jarzabkowski et al. 2007), offering an alternative to the managerial decision-making models, the narrow focus on only economic performance and quantitative research that dominate the field, widening the methodological base with several qualitative approaches, adding new perspectives of strategic actors, levels and organisations, and bringing to light practices and capabilities that have otherwise passed unnoticed (Vaara & Whittington 2012). Still, as Vaara and Whittington state, there is a call for focusing more attention on actors beyond the managerial ranks to professionals, sales persons or experts, elucidating how actors adopt and internalise practices and how the micro-level practices can be understood on wider macro-institutional levels. From this perspective it is important to study the previously largely neglected strategic role and practices of mid-level practitioners in supporting functions.

2.3 Defining the concepts of 'strategy' and 'strategic change' within organisations

Strategy has been defined in many ways; the most common being a functional vision, seeing it as a *deliberate plan* that determines decisions in the future and focuses on *control* to make sure that managerial intentions are realised in action (Mintzberg et al. 1998; 2009). Strategy should, as Mintzberg et al. (ibid.) state, be defined more broadly, firstly as a *pattern*, i.e. consistency of behaviour over time, but also as a *position* or *perspective* looking at the spot where strategy meets the customer, looking inside the organisation and seeing the fundamental way of doing things. A narrow way of defining strategy nourishes the rational and technical planning orientation of strategic management, separating formulation and implementation activities (Clegg et al. 2011, 15-18; Seeck 2008).

Rather than a document or state, process research sees strategy as *dynamic* movement, action and processes, emphasising renewal, growth and entrepreneurial work (Pettigrew 1992; Schendel 1992). I agree with this, and embrace in particular Mintzberg's (1990) idea of strategy as the missing *link* that is needed *between planning and action*, while strategy represents a fundamental congruence between external opportunity and internal capability. Furthermore, an interesting aspect for understanding employees' proactive, strategic practices is Weick's (2001) vision of strategy as *combining the sensemaking processes to emerg-*

ing commitment and social order within the organisation. The interpretive view shares the S-as-P view of strategy as *socially constructed* and *action oriented*. Sensegiving and sensemaking activities in the strategy process are central in developing a collective understanding of strategy, social order and justification at all levels of the organisation and among the stakeholders (Gioia & Chittipeddi 1991; Weick 2001, 15).

The latest practice-based turn defines strategy as 'something people do', meaning the organisation's 'everyday practices, routines and norms' (Carter et al. 2008; Jarzabkowski 2004; Johnson et al. 2003; Regnér 2008), and organisational *actions* and *activities* (Aaltonen 2007) and more precisely, 'a situated, socially accomplished activity' (Jarzabkowski & Spee 2009). SAP means prevailing organisational and social practices that have otherwise passed unnoticed in particular tools and methods of strategy-making *(*practices*),* how strategy work takes place *(*praxis*)* and the *role* and *identity* of the *actors* involved *(*practitioners*)* (Vaara & Whittington 2012), attempting to understand organisation members' *perceptions, emotions* and *motivations* (Jarzabkowski & Spee 2009), as well as *psychological* and *social dimensions* and deeply embedded *tacit knowledge* of organisational routines (Kriger 2005). Similarly, in the field of leadership, the practice turn and studying dynamic, collective micro-level leadership practices are gaining ground in order to capture the 'doing leadership', as a practical activity in complex organisations (Denis, Langley & Rouleau 2010).

The way I want to define strategy has evolved during the research process, in cooperation with practitioners, colleagues and students. My definition started from more traditional grounds, seeing strategy as the *means to achieve the organisation's objectives*, to a more interpretive and practice-based understanding of the strategy as *interaction and activities,* and finally towards seeing strategy in a more practical and social way, as a '*shared tool* to successful practices of practitioners to achieve the objectives of the organisation, (see Figure 7). Seeing strategy as a tool follows, for example Mantere's (2008) conclusion that strategy can become a helpful tool in providing 'a backbone' for work activities and meaning to everyday work. According to S-as-P thinking, strategy is a social construction (Carter et al. 2008; Jarzabkowski 2004; Johnson et al. 2003; Regnér 2008) and needs thus to be shared. Defining strategy as a shared tool enables cooperation across organisation levels and unit boundaries, combining the micro and meso to macro levels of the organisation on a global scale.

Strategic change in this thesis is regarded as *teleological*, i.e. as purposeful, target-oriented, cooperative development (Van de Ven & Poole 1995) that can be divided into changes in the *content* of strategy and changes in the *organisation* (Mintzberg & Westley 1992). The definitions on strategic, incremental and organisational change partly conflict with each other in the strategy literature, reflecting the complexity and extent of the phenomenon within organisations. From the point of view of employees, I talk about *strategic organisational changes* that, according to Galbraith (1983), have impact on the whole system of organisations or redefine the organisations' basic frameworks of strategy, structure, processes and people through a good fit between these areas. Huy and

Mintzberg (2003) aptly describe effective and sustainable organisational change as a well-balanced rhythmical combination of *dramatic* change, descending from the top; *systematic* change, generated laterally; and *organic* change, emerging from the grassroots, and that change can be managed with a profound appreciation of this rhythm, and thus stability. Hofstede, Neuijen, Ohayv and Sanders (1990), Mintzberg and Westley (1992), Senge (1990/2006) and Schein (2010) further describe organisational change as the complex, multifaceted and holistic social process of learning on various cycles and demanding changes at all organisation levels and in the organisation's culture. Change processes demand on-going, non-linear interplay or a reconciliation of tension and energy, as well as small changes at the micro level in interconnected systems (Van de Ven & Poole 1995; Weick & Quinn 1999) involving employees in on-going dynamic processes of activities in a series of phases of searching, doing, learning and modifying and bringing the strategy to life (Kotter 1995/2007).

2.4 Strategy process and strategy work

Strategy process is traditionally understood as a top-down line of actions, which starts by analysing the environment, formulating strategy on the basis of the mission, vision and organisational values and implementing the strategy as operational processes. This *narrow view* of the strategy process, based on the Harvard Design and Planning schools of thought, is concerned solely with the managerial planning processes, leaving out the implementation processes, other actors and the organisation (Mintzberg et al. 1998). The mainstream, linear, input-output model is criticised by process researchers (Bourgeois & Brodwin 1984; Huff & Reger 1987; Pettigrew 1992; Schendel 1992; Van de Ven 1992) claiming that planning and decision-making should not be separated from the implementation and that strategy processes should be seen as dynamic sequences of events or activities that describe how things change over time. Hence, a *wider* definition includes the processes of strategy formulation and implementation involving decisions of how the organisation's resources, i.e., people, processes and systems, will be aligned and mobilised towards the objectives (Mintzberg & Quinn 1996).

In this research strategy process is defined wider as 'a wide range of activities that are perceived as related to planning, communicating, implementing and reviewing strategy'. Yet, the main interest is in implementation, because it is the most important part of the process for practitioners. I do not embrace the traditional approach of treating strategy implementation as an activity following the formulation without involving the commitment of the whole organisation, but more as a collaborative, cultural and growing, 'crescive' activity (Bourgeois & Brodwin 1984), or as Mintzberg (1978) puts it, 'emerging'. For his model, Mintzberg was harshly criticised by representatives of classic views (e.g. Ansoff, 1991), and his model never became very popular in either research or

practice. The learning and cultural views continued studying strategy process as an emergent learning process intertwining strategy formulation and implementation (Cohen and Levinthal 2004; Mintzberg et al. 1998; Mintzberg & Lampel 1999), however, mainly from the managerial perspective. Some more radical researchers, such as Chia and Holt (2006), have continued on 'emergent' lines with their 'dwelling' mode of strategy, appreciating human agency in the spirit of Heidegger and claiming that strategy is co-constructed and relational, taking place through everyday practical coping without presupposing deliberate planning.

Strategy as a cyclical process that encourages people to incorporate new information into action and emphasises social interaction and cooperation (e.g. Sull 2007). In the Strada project (2000-2011), studied by Aalto University, similarly they underlined the importance of interaction in strategy work. Social learning occurs in organisational culture, building upon shared assumptions, solutions and stories learned by organisation members, and considered as valid or plausible to be taught to new members as the correct way of thinking and acting (Schein 2010, 18; Weick & Roberts 1993). Changes through one-sided planning processes are difficult because of the historically and socially constructed organisation culture (Hofstede, Neuijen, Ohayv & Sanders 1990).

One-way strategy planning processes, however, are the reality in at least large organisations where employees do not participate in strategy formulation. As the applied grounded theory analysis involves close contact with the data and practice in the organisations, I focus on implementation practices, even though I believe the ideal would be that all organisation members would have a say in the organisation's strategy, to enable its common understanding and active implementation. In the spirit of S-as-P, this research aims at understanding human agency, tacit knowledge and everyday social practices, as the most important part of strategy process, offering means to implement strategy more successfully (Carter et al. 2008; Johnson et al. 2003; Regnér 2008), accepting, however, the framework where organisation members act.

Assessing a process involves some kind of an *outcome*. The traditional view of strategic management seeks a straightforward causality in the strategy process between input and output as economic performance, through parsimonious sets of variables succeeding only partially in explanation (Jarzabkowski & Spee 2009). Looking solely on straightforward causal explanations, much valuable work is missed in organisations, for example the work that supports direct profit-making activities. The performance view assumes that attaining the strategic goals should be numerically measured with indicators such as revenue, profit, volume and so forth — whereas Aaltonen (2007) argues that these measures tell only a little about *how* the results are reached and with what kinds of processes and activities people are engaged. Deming (1981) emphasised that if an organisation wants to increase productivity and quality, it should not use numerical goals but rather focus on doing a better job. From a voluntaristic point of view appreciating people's potential, the research of strategic management that settles with studying only quantitatively measurable entities,

misses the real iceberg where human capabilities can be hiding. The strength of the S-as-P research on outcome has been on its understanding of situated phenomena across different levels — individual, group and organisational (Jarzabkowski & Spee 2009).

The dominant focus of literature, mainly on profitability, competitive advantage and economic efficiency, has raised a call for a new focus on positive organisational change (Cameron & McNaughtan 2014). Interestingly however, several studies, such as Cameron and McNaughtan (2014), have argued that organisations in several industries that implemented and improved their positive practices over time also increased their performance in desired outcomes such as profitability, productivity, quality, customer satisfaction, and employee retention. Of course, there is also research that points to the opposite.

This study seeks an outcome in the spirit of S-as-P (Jarzabkowski & Spee 2009; Mantere 2005) and Positive Organisational scholarship (POS) (Cameron, Dutton and Quinn, 2009) in the form of an active, empowered and engaged practitioner's role in the strategy process that can lead, in the long run, to successful and sustainable strategy implementation and organisation results. When searching for sustainable success, the micro-level outcome becomes critical in building longitudinal organisation level outcome. Individual outcome based on the perceptions and assessment of the agents themselves is somewhat far from the traditional demands of exactly measurable assessment criteria. However, practitioners' multilevel practices in complex strategy implementation contexts involve more variables than any calculation model can handle.

S-as-P literature has used the term *strategy work* or *strategizing* for everybody's work within an organisation, involving practices, praxis and practitioners (Jarzabkovski 2004; Jarzabkowski & Spee 2009; Vaara & Whittington 2012; Whittington 2006). Vaara and Whittington (2012) use the term '*strategy-making*' as an umbrella term, describing the creation of organisational strategies, including strategy formulation, organising the work of strategy implementation and activities leading to the emergence of strategies. However, another focus in S-as-P literature has been that of formulation rather than implementation of strategies (Aaltonen 2007; Whittington 2006). Correspondingly, the term *strategic renewal* refers more to strategy formulation, which is how Floyd et al. (2011), for example, use it.

In this research *strategy work* is regarded as a large phenomenon that combines strategy and organisation in strategy processes. The term is seen to better capture the work of everyone in strategy processes, both managers and practitioners, than 'strategic management' or 'strategizing'. The term 'strategy work' is not used much in the mainstream research of strategic management and is not conceptualised comprehensively, taking genuine account of practitioners' points of view, even though their part of strategy work is essential. In this dissertation I take some steps towards conceptualising the mid-level practitioner's role in strategy work and its implementation.

2.5 Strategy implementation

Strategy implementation involves knowing and understanding the strategy and also knowing what the strategy means in practice, i.e. in the context of the organisation. The resources of employees need to be *organised* in order to exploit them to their full potential (Barney 1995). Strategy implementation is about cooperation and knowledge-sharing with other organisation members in a "process of putting the intended strategy into action" (Ikävalko 2005). This process is, however, still a challenge for both strategic management research and for organisations in practice. Strategy implementation is elusive (Bourgeois & Brodwin 1984), ubiquitous (Nutt 1986), complicated and communicative (Aaltonen 2007), challenging and problematic (Hrebiniak 2006) and difficult (Sull et al. 2015), to the extent that Pryor, Anderson, Toombs and Humphreys (2007) suggest strategic implementation might emerge as a core competency. The main reason for the elusiveness of implementation is that strategy processes are separated into both planning and implementation processes, executed by different persons, as Mintzberg (1978; 1990), Senge (1990/2006) and Hrebiniak (2006) also state. Implementing someone else's plan is not as easy as implementing one's own plans, because of the missing feeling of purpose and ownership of the strategy, stated also by Luoma (2014) and Mantere (2005). When separating these issues sensemaking is needed at every level of the organisation. The sensemaking is especially important at the middle-level, where strategic information should flow both vertically and horizontally within the organisation.

The early strategic management research in the middle of last decennium was interested in the *intersection of strategy and organisation* (Floyd et al. 2011). However, the planning, designing and positioning of strategy prevailed the field and have dominated the research (Mintzberg 1990) until these days. The literature of strategy implementation became more popular again in the 1980's (Furrer et al. 2008; Huff & Reger 1987) but the discussion was normative concentrating on implementation tools and systems or on organisational performance, meaning mainly economic performance (Aaltonen 2007; Bourgeois & Brodwin 1984; Furrer et al. 2008; Galbraith 1983; Jarzabkowski & Spee 2009; Nutt 1986; Pettigrew 1992; Vaara & Whittington 2012).

The second influential discussion on strategy implementation was stimulated by Kaplan and Norton in 1996 (a, b), and is still enormously popular in the field, but their focus is more on monitoring the realising of strategic targets, instead of addressing the roles or sentiments of the people involved. It can be argued that the practice turn and the field of Strategy-as-Practice research has brought strategy back to its origins, near the people, their practices and processes, concerned with 'strategy-making' or 'strategizing', referring to the whole strategy process from formulation to implementation within the organisation (Jarzabkowski & Spee 2009; Vaara & Whittington 2012).

Even if strategy implementation is difficult and fails often, the basics are essential when combining processes and people. As Yukl and Lepsinger (2007)

put it, people need to know 'what to do, how to do it and when it should be done'. Nohria, Joyce and Roberson (2003) claim, according to their longitudinal study in organisations, that 'what really works' is not management tools or techniques but basic things and primary management practices, such as clear strategy, disciplined attention to execution, promoting high level performance culture, and a flexible organisation structure with little bureaucracy, regulations and formalities. Kaplan and Norton (2008) argue that employees need motivating targets, the executions of which must be followed up in regular discussions. The employees' performance should be monitored because it increases the employees' perceptions that they have been treated fairly which, in turn, enhances subordinates' trust in their leader and ultimately increases Organisation Citizenship Behaviour (OCB), thus having a positive effect on performance (Podsakoff, MacKenzie, Paine & Bacharach 2000). If the implementation is this simple, why then is it such a challenge for both theory and practice?

The strategy is often too analytical or separate from the practices and processes in reality (Whittington et al. 2006) and strategy implementation demands the dynamic cooperation processes of organising, coordinating and integrating knowledge, resources and work in the organisation (Grant 1996). The implementation processes combine and apply knowledge and practice in ubiquitous formal and informal events in temporally dispersed processes through which tacit knowledge can be created at all levels in the organisation (Grant 1996; Kogut & Zander 1992; Nutt 1986). In the cooperation processes valuable and not easily imitated or substituted capabilities can be created within organisations (Barney 1991; 1995; 2001). Strategy implementation, as a process of integrating and applying organisational knowledge in order for organisations to work more effectively, shares also the objective of Knowledge Management, as presented by Nonaka and Takeuchi (1995) and Dalkir (2011, 3).

However, as Grant (1996) also points out, coordinating and integrating is not the root of the problem but the cooperation between the *people*. Mantere (2008) states that it is important to notice that organisations do not create, implement or renew strategies, but people do. Galbraith's (1983; 1986) description of successful implementation as a 'good fit between strategy and organisation', is about how organisation members understand the strategy and can make it their way of work in the organisation's social structures. The problem has often been, as Whittington et al. (2006) also argue, that these have been treated as separate phenomena rather than an essential part of strategy work. Both internal and external practices are needed; strategy implementation literature emphasises internal activities, while competitive dynamics models emphasise external activities (Aaltonen 2007, 35). However, the boundaries between internal and external blur, especially in global concerns with multiple subsidiaries, partners and outsourced service, production and other activities. Adaptive practices such as sensemaking, negotiating, organising or interacting in social networks increase championing activity and the feeling of purpose and ownership in work (Mantere 2005).

The studied views of strategic management research on strategy implementation are compiled in Table 2. Current research does not pursue the straightforward, short-term mainstream strategic management objectives, but rather examines the 'antecedents' of economic performance in the form of people and their practices — especially in the spirit of S-as-P research, near people's realities in the implementation processes of an organisation's strategy.

TABLE 2 Strategy implementation according to strategic management research views

Research view	Strategy implementation is…
Mainstream strategic management (Furrer et al. 2008; Hoskisson et al. 1999; Mahoney & McGahan 2007)	… operational activities in order to achieve the objectives of the firm, performance
Resource-based view (Barney 1991; Wernerfelt 1984)	… organising resources through cooperation between people, in order to create competitive advantage
Dynamic resource-based view (Helfat & Peteraf 2003; Teece et al. 1997; Regnér 2008)	… adaption, learning and change processes though building, integrating and reconfiguring resources and capabilities over time, and thus evolution of intangible assets and an organisation's ability to achieve new and innovative forms of competitive advantage
Knowledge-based view (Grant 1996; Kogut & Zander 2002; Nonaka & Takeuchi 1995)	… integrating and applying knowledge and practice in ubiquitous formal and informal events in temporally dispersed processes, through which tacit knowledge can be created within the organisation
Process view (Pettigrew 1992; Schendel 1992)	… action, movement, individual and collective human agency, renewal, growth and entrepreneurial work as an inseparable part of strategy process
Strategy-as-Practice (Jarzabkovski 2004; Jarzabkowski & Spee 2009; Vaara & Whittington 2012; Whittington 2006)	… part of strategizing, everybody's work in the organisation, involving practices, praxis and practitioners, embedded in social processes

In addition to the literature of strategic management, Strategic human resource management (SHRM) is also interested in people implementing strategy, however, mainly from the perspective of HR practices and HR strategy (Boxall & Purcell 2008, 58-59; Salaman et al. 2005, 1-9). However, seeing SHRM broadly, as 'anything and everything associated with the management of employment relations in the firm', increases the possibilities for fruitful interdisciplinary research for the organisations' viability (Boxall & Purcell 2000). This is important because the act of people implementing strategy plays a strategic role in an organisation's success and is a main source of competitive advantage (Armstrong 2011, 48). *High involvement or high performance work systems* (HIWS or HPWS) are especially interesting for improving strategy implementation, facilitating employee involvement through empowering work design, skill enhancement and

motivation (Armstrong 2011, 166-167; Boxall & Purcell 2005, 77-78, 120), as well as the AMO framework, seeing performance as a function of employee abilities, motivations and opportunities to participate (Armstrong 2011, 10; Boxall & Purcell 2005, 5, 122). Well-implemented, these practices improve employee autonomy, development, use of skills and performance, but poorly implemented, not taking account of context variables, the effects can be negative (Boxall & Purcell 2005, 140-141; Godard 2004, 147-170).

2.6 Practitioner's role and identity in strategy process

By *employees* and *practitioners* I mean all members of an organisation excluding top management. The research focuses on *mid-level practitioners* in organisations having a strategic position in the strategy process between top management and grass-root employees. Gioia and Chittipeddi (1991), Floyd and Wooldridge (1992), Wooldridge et al. (2008) state that middle managers have an important role in the strategy process, conveying the strategy to employees and being responsible for the implementation. Current research looks also at the activities of other mid-level practitioners, such as assistants, experts and officers, whose strategic role the research has previously largely neglected.

I have chosen to study the practitioner's 'role' in order to understand and describe a rather large concept, intertwined with the concept of *identity*, including several *social* and *professional* dimensions in an *organisational context*, see Figure 4. The traditional view sees that employees' roles are created top-down within the organisation's hierarchy, placing the employees in a passive role, not capable of planning their own work according to organisational strategies. Mantere (2008) also criticises the traditional sociological way of seeing the 'role' concept, arguing that it is too rigid when studying championing practices — mainly based on the expectations external to the acting subject. Correspondingly, the traditional functionalist strategy view treats employees' roles as externally determined from upwards and expecting conforming and implementing practices and not encouraging the purposive agency of subjects. Kotter (2007) states that a strict organisational structure and job categories can undermine people's efforts to increase productivity or make it difficult to think about customers. Kotter (2012) suggests encouraging informal 'change agents', i.e. actively energising employees with the spirit of volunteerism, allowing them to work with each other for a shared purpose.

According to a more interpretive view, the formal structures of the organisation form only a part of the role, while the role is constituted rather as part of the social environment in the organisation. Wrzesniewski, LoBuglio, Dutton and Berg (2013) argue that employees are not passive recipients but instead active participants that can construct a more *proactive* role, identity and meaning in their work. Moreover, Alvesson and Willmott (2002) claim that more flexible and *self-organised* ways of control afford employees a greater scope in arranging their schedules and working practices, involving a processing of subjectivity in order to constitute employees who are more adaptable and capable of moving

between activities and assignments. The supporting of more adaptive and proactive work roles is important because tasks and work environments become rapidly more unpredictable and uncertain (Griffin, Neal & Parker, 2007).

The S-as-P perspective combines a practical, sociological and micro-level understanding of a practitioner's role, as the *practices* they have in the strategy process (Johnson et al. 2003; Jarzabkowski 2004; Carter et al. 2008; Regnér 2008), but also as the *social position* and the *individual power* they experience in the process (Knights & Morgan 1991; Mantere 2003). According to the S-as-P view, strategic practices are the social, symbolic and material tools through which strategy work is done, and praxis is the flow of these activities (Jarzabkowski & Whittington 2008, 282). Strategic activities are understood as dimensions of the employee's role or the other way around, as Mantere (2008) puts it, roles are a part of everyday strategic practices, and practitioners think, communicate and act relying on the concept of role expectations.

The roles that employees play in the society shape their identity through the meanings they attach to them (Stryker & Burke 2000). In Cartesian spirit it could be argued that if a practitioner perceives that he or she plays a role in the organisation's strategy process, it creates a feeling of existence and thus, strengthens the practitioner's identity in the organisation. According to Alvesson and Willmott (2002), identity can be constructed in the context of organisations with several overlapping and related ways through, for instance, *professional* or *occupational* affiliation, organisational *position*, *social values* and *self-awareness* of own values and feelings. In this study I am more interested in the practitioners' professional and social rather than psychological aspects. The concept of *organisational identity* is closely related to the identity I seek, as connected with the work, profession or organisational role as stated by Wrzesniewski et al. (2013). However, it is important to see that people's attitudes and perceptions are moulded in complex informal social situations and webs of relationships (Ibarra & Andrews 1993).

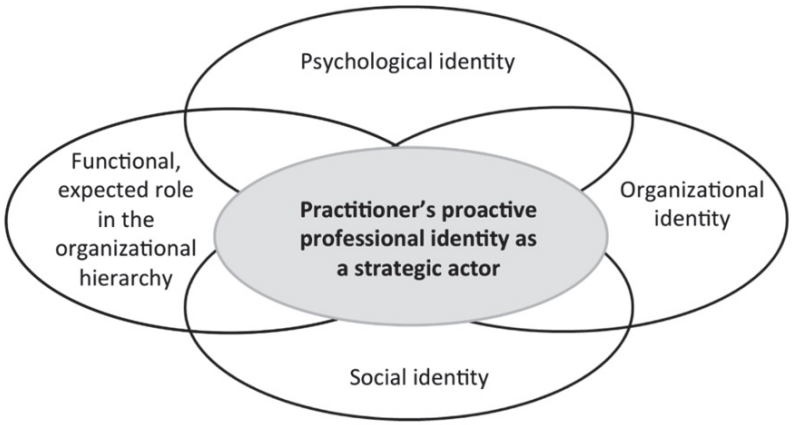

FIGURE 4 Dimensions and identity of practitioner's searched role

Employees occupy their roles at work to varying degrees; some are psychologically more fully present during role performance than others, as Kahn (1990) puts it. Hence, when people are engaged they couple themselves to their work roles physically, cognitively and emotionally during role performance. Extending Hackman and Oldham's (1976; Cameron & McNaughtan 2014) theory of *job design,* in which the presence of five characteristics of jobs predicts a significantly higher level of performance—namely, skill variety, task identity, task significance, feedback, and autonomy — Wrzesniewski et al. (2013) suggest that organisational identity can be cultivated through *job crafting,* i.e. the employee shapes the tasks allowing one-self to grow towards a more desired self and positive work identity.

In a more enabling context, practitioners make sense of their roles and find *meaning* or *meaningfulness* in their work role. According to Rosso et al.'s (2010) review, the research of the meaning of work in different organisational traditions has recognised several intertwined sources of the meaning of work, related to 'self' and individual factors such as values, beliefs and motivation, but also to 'others' i.e. co-workers, leaders, groups and communities, social value systems and attitudes in the working context. Rather than individual or personal factors, this study is concerned with social processes at work, as strategy is considered to be socially constructed in the context of the whole organisation's values, beliefs and attitudes. Rosso et al. (2010) identify psychological and social mechanisms through which researchers have proposed that the meaning of work is created in, for example, combinations of experienced authenticity, self-efficacy, belongingness, sensemaking and purpose, however stating that the social and cultural perspectives of these processes are less studied than the psychological views in organisational research. As Wrzesniewski et al. (2003) state that the meaning of work is composed in dynamic interpersonal sensemaking processes between people at work. The social and cultural processes are assumed to be essential also in strategy work.

In many strategy models the only strategic thinkers and actors are the top managers and the top management team, as Aaltonen (2007) also notes, but in this research, as well as in S-as-P literature, employees are considered in a voluntaristic way, believing in their potential and seen as *strategic actors* (Johnson et al., 2003; Whittington, 2006) or as Mantere (2003; 2005; 2008) puts it, *agents,* capable of carrying out strategic action and having a crucial role in strategic success. More precisely, Mantere (2003, 75-77; 2005) categorises active organisation members in the strategy process as *citizens,* i.e. 'good actors' that communicate a general conviction of acting as a part of the strategy process, still not transcending the own immediate working sphere and *champions* that try to influence strategic issues larger than their own immediate operational responsibilities.

The idea of championing has similarities with concepts of *extra-role behaviours* (ERB), as 'behaviour that goes beyond delineated role description and attempts to benefit the organisation' (Van Dyne, Cummings & Mclean-Parks 1995) — of which the most established is *Organisational Citizenship Behaviour* (OCB),

originally defined by Organ in 1988 (Organ 1998) as 'individual behaviour that is discretionary, not directly or explicitly recognised by the formal reward system, and that in the aggregate promotes the effective functioning of the organisations'. According to Podsakoff et al.'s (2000) review, organisational citizenship behaviours are summarised to include the themes of (1) helping behaviour, (2) sportsmanship, (3) organisational loyalty, (4) organisational compliance, (5) individual initiative, (6) civic virtue, and (7) self-development. Of these, *helping behaviour* in particular has been identified as an important form of citizenship behaviour by virtually all scholars who have worked in this area (Podsakoff et al. 2000). Furthermore, helping behaviour is especially interesting from the point of view of mid-level practitioners in supporting functions.

Strategic practices should not be explored solely from the managerial perspective, being irrelevant to practitioners and reinforcing the status quo as McCabe (2010) also warns. I believe the ultimate goals of managers and employees are consistent, but the *common understanding* of them is not self-evident without dialogue. Thus, the employees' roles and practices need to be studied open-mindedly, without stagnating to taken-for-granted explanations, as Vaara and Whittington (2012) also state. Mantere (2008) argues that a two-way view of the role expectations would elucidate the tensions and enable *agency* and fulfilling of the roles. In the current research I attempt to shed light on practitioner agency in the multidimensional dialogue around the professional identities in strategy work. The *key resources* also relevant for mid-level practitioners for regulating identity in a corporate context are considered to be *knowledge* and *skills* — knowing the rules and the code of conduct, as well as being a member of the wider corporate groups and teams (Alvesson & Willmott, 2002).

According to Laine and Vaara (2007) the perspective of *subjectivity* can be utilised to understand how strategic talk can lead to strategic roles and identities. Drawing from Knights and Morgan (1991), Laine and Vaara (2007, 30) formulate and develop further subjectivity as a discursively constructed sense of identity and social agency, i.e. discourses producing subject positions for the actors involved, and actors employ specific discourses and resist others to protect or enhance their social agency or identity. This perspective is closely related to my view, even though in the current research I am not looking at discourses, but more the activities, practices and perceptions that form the roles and identities of mid-level practitioners. The activities, however, are often comprised of discourses.

2.7 Practitioner's activity and agency

The objective of this research is to understand and construct an *active* practitioner's role in the strategy process. This *activity* is understood to get its shape from the activities and practices people have in strategy processes, i.e. the strategic *agency* of practitioners. Human agency can broadly be defined as the ca-

pacity of an agent to act, make choices and impose these choices in the world (Seeck & Parzefall 2008). By the 1930s, Barnard had defined an organisation as a system of consciously coordinated activities of organisation members coming into being when there are persons able to communicate with each other and who are willing to contribute to action to accomplish a common purpose (Burrell & Morgan 1979/2011, 148-149). Like Barnard and Rosso et al. (2010, 113-115), I believe that people naturally pursue purposeful agency and desire communion with themselves and others approaching their work in different ways, finding a meaning of work from multiple sources and opportunities for purposeful action.

The research on agency in organisational tradition has heavily concentrated on economics, incentives, cost and risk taking in the *relationships of principal and agent*, for example, managers and owners in large corporations (Eisenhardt 1989). However, Eisenhardt states that the agency theory is consistent with the early organisational work of Barnard on cooperative behaviour, as well as March and Simon on employment relationship. It offers some applicable perspectives and tools to help understand the 'black box' of the organisation, both at micro and macro level, concerning, for example, incentives, information systems and outcomes encouraging agency in cooperation relationships. While the classic works of Barnard, Lewin and Likert emphasise cooperation and social aspects of organisation and its members (Burrell & Morgan 1979/2011, 125, 144, 148), the research on agency has receded towards more abstract, mathematical streams, focusing on the trade-off between the cost of measuring behaviour and outcomes and transferring risk to the agent (Eisenhardt 1989).

Studying practitioners' agency is important because there is little empirical work on embodied, intangible strategy practices, such as strategy know-how (Jarzabkowski & Spee 2009) and agency, action and practice and how they interrelate (Chia & Holt, 2006). S-as-P study practices as 'a complex bundle, involving social, material and embodied ways of doing that are interrelated and not always articulated or conscious to the actor' (Jarzabkowski & Spee 2009). The most common approach to practices according to Jarzabkowski and Spee is looking at discursive practices, even though there is no dominant view. Practices in this research are not studied through discourses but through the mid-level practitioners' perceptions of their practices. However, perceptions are expressed through discourses. The practices also concern the interaction of practitioners moulded in cooperation, defined here as 'actions and activities that are concrete micro-level tasks and routines mid-level practitioners have in social cooperation in strategy process'. Aaltonen (2007, 26-30) in turn defines *strategic activities* as an on-going flow of actions to which the members of the organisation relate for the realisation of strategic goals. Aaltonen further distinguishes action as 'something that is done' (ibid.). Similarly, Mantere (2005) defines strategic issues as those that the agents report as crucial for the organisation's success. Applicable from the perspective of strategy implementation is also Masalin's definition of communal strategic agency as: 'shared willpower of a specific group of individuals, driven by emotional energy and determined to action

that will contribute to the success of the organisation they work for' (Masalin 2014, 5).

Strategic agency demands *empowerment* that can be defined as an individual's perception of increased intrinsic task motivation with a sense of impact, competence, meaningfulness and choice related to an active orientation to the work role (Spreitzer 1996; Thomas & Velthouse 1990) and performance (Dirks & Ferrin 2002), enhancing feelings of self-efficacy, intrinsic motivation and success (Ahearne, Mathieu & Rapp 2005; Conger & Kanungo 1988), trust (Bartram & Casimir, 2007; Zimmerman. 2010) and creativity (Zhang & Bartol 2010). The causality between the relationships can also be multidimensional and not always direct, e.g. empowerment increases the perceived trust and intrinsic motivation which, in turn, increase performance outcomes (Ahearne et al. 2005; Dirks & Ferrin 2002; Zhang & Bartol 2010).

There are still challenges understanding how to *create* agency, not to speak of how to create *sustainable and successful strategic agency of practitioners*. Mantere (2005) argues that adaptive practices such as strategic sensegiving, cross-organisational development projects, discussions and negotiations in social networks create a feeling of ownership and championing in strategy work. According to Masalin (2014, 5) communal strategic agency is constructed in the flow of actions and interactions of strategic practitioners who participate in specific strategic practices in a specific business context. The challenge of studying this agency is that the nature of it is deeply embedded in social practices, beneath the busy surface of events and taken-for-granted activities (Jarzabkowski & Spee 2009; Vaara & Whittington 2012). Moreover, practices and processes are closely intertwined both at a conceptual and practical level (Carter et al. 2008). Still, as Seeck and Parzefall (2008) underline, it is important to acknowledge the potential of employee agency in work relations manifesting as self-actualisation, action and creativity rather than simply reacting to employer behaviour.

Activity requires *knowledge*. Knowledge, in turn, is worthless if not shared and applied; it becomes productive only when integrated into a task (Drucker 1992; Small & Sage 2005; 2006). *Knowing* and *learning* capture the dynamicity of knowledge, being interlinked in social interaction and building, little by little, common understanding and learning in the organisation and thus, having the potential to lead to organisational knowledge and collective intelligence (Davenport & Prusak 1998; Small & Sage 2005; 2006). Knowledge entails a knower (Small & Sage 2005; 2006) and is created by individuals (Grant 1996; Nonaka 1994). Hence, I need to study the 'knowledge' of strategy implementation from the point of view of practitioners. Nonaka and Peltokorpi (2006, 175) state that research has focused surprisingly little on the 'knowers', even though organisations' most essential resource is knowledgeable people (Drucker 1992). Current research addresses mid-level practitioners as knowers of strategy implementation. Like Mantere (2005; 2008), I believe that enabling practitioners' strategic agency is a key question in understanding the success of organisational strategies.

Participation and reciprocity enable strategic agency in a community (Masalin 2014). Action and participation are closely linked to *communication* (Mintzberg 1994; Stensaker, Falkenberg & Grønhaug 2008) and *sensemaking* processes, reducing the ambiguity in the organisation (Weick 2001, 51). According to Mantere (2003) the emergence of agency demands sensemaking to understand the strategy process, *power* in the process, i.e. the capability of influencing in the strategy process and *activity* to use the capabilities in the process. Moreover, strategic *discourses* affect employees' activity. Mantere and Vaara (2008) showed that organisational discourses either promote or impede employees' participation. In turn, Laine and Vaara (2007, 30), state that strategic actors employ specific discourses and resist others to protect or enhance their discursively constructed subjectivity, social agency and identity. Hence, the roles in the strategy process consist not only of agency but also of interlinked dimensions of sensemaking processes, enacted statuses and distribution of power in social existence. (Mantere 2003, 42-44).

Organisational psychological research has found several linkages and interdependences between human feelings enhancing agency. The feelings of *fairness, justice* and *equity, interaction, feedback* and *supervisor support* increase organisational commitment and job involvement (Mathieu & Zajac 1990; Rhoades & Eisenberger 2002; Tilev & Vanhala 2014). They further state that *autonomy* and the *possibility to influence own work* is important for commitment. Ryan and Deci (2000) similarly state that social conditions and contexts supporting people's natural activity and engagement are responsive to basic psychological needs, such as autonomy, competence and relatedness. According to Bandura (2009) socio-cognitive factors, primarily self-efficacy, yield action, change and personal and organisational effectiveness. The most effective way to build self-efficacy is through success achieved by learning from mistakes and through social modelling, i.e. seeing people similar to one-self succeed (ibid.).

However, activity and agency are not sufficient for successful implementation manifesting themselves at the worst in a negative manner or against the organisation's goals. In addition, *engagement* is needed. The employees' engagement is defined in organisational psychology as constituting of three basic elements; *vigour* — meaning feelings of a high level of activity and energy; *dedication* — i.e. feelings of enthusiasm, challenge, significance, meaningfulness and strong involvement in one's work; and *absorption* — i.e. being fully concentrated on and happily engrossed in work so that time passes quickly (Schaufeli et al. 2002; Bakker 2011). This definition builds on Kahn's (1990) pioneering depiction of engaged employees as *physically*, *cognitively*, and *emotionally* connected with their work roles, finding that most important drivers of engagement are psychological conditions as meaningfulness, safety and availability on multiple levels of influences: individual, interpersonal, group, intergroup and organisational. According to his review of the field, Albrecht (2010, 5) proposes an integrating, universal core definition of employee engagement as 'a positive work-related psychological state, characterised by a genuine willingness to contribute to organisational success. This definition corresponds well to the basic aims of

strategic management on organisational performance, as well as to this research in its search for the successful role of the mid-level practitioner within the strategy process.

2.8 Communication in strategy work

Communication is an essential part of the strategy process between management and practitioners in an organisation and is becoming more and more important in the global, online-connected world. The mainstream idea of strategic communication relies on the *functional hierarchy* of the organisation, since the idea of strategy and structure, presented by Chandler (1962; 1990). Correspondingly, the research has most often addressed organisation structure and control, rather than communication, as a means of managing strategy implementation. The narrowest way of seeing communication in the strategy process is defining it as a launching of formulated strategy. The functional performance view dominates to the extent that the terminology or conceptualisation of 'strategic communication' or 'strategy communication' is not established.

The functional view presupposes that strategic information proceeds top-down from management to the grassroots, like a cascade from level to level within the organisation. In addition to the metaphor cascade, information or knowledge 'funnel' has also been used to describe how the strategic information not only proceeds in the organisation, but also the amount of it diminishes. The influential strategy implementation model of Kaplan and Norton (1996, a, b.) emphasised the meaning of communication in strategy processes. This communication is based on a relatively structural process, using the balanced scorecard, starting with translating the vision to operational terms, continuing with disseminating the strategy and linking it to departmental and individual objectives and then finally reviewing and evaluating the results. Even though this kind of a communication system is effective when monitoring the results of a strategy process, the remaining implementation gap witnesses that it is not sufficient for the employees to understand the strategy and their role in implementing it. The prevalent view of strategic communication is so heavily affected by the functional, systemic, planning and control oriented ways, that informal communication and subjective thinking have been considered as 'noise' by-products of perfect systems and decision-making (Eriksson 2012, 127-128).

Recent avenues of strategic management research have contributed to a deeper understanding of strategic communication, also including more informal communication. Process and implementation scholars have studied communication as an important part of the strategy processes (Pettigrew et al., 2002). Research on middle managers practices in the strategy processes has had particular significance for the field of communication. Gioia and Chittipeddi (1991), Floyd and Wooldridge (1992), and Ikävalko (2005) and Rouleau (2005) have

shown that communication and interaction are essential for middle manager agency within the strategy process. Moreover, Balogun and Johnson (2004) and Rouleau (2005) point out the importance of lateral and informal communication in strategy processes. Weick's studies of strategic sensemaking, compiled in Making Sense of the Organisation (2001), are pre-eminent in the field. Cohen and Levinthal (1990) and Gavetti and Levinthal (2004) show how interaction, knowledge and learning as social processes are essential for understanding the strategy and thus for a successful performance. Nohria et al. (2003) state that similarly important is to consistently communicate the strategy to customers, employees, and shareholders. To sum up, even though numerous studies indicate that interaction is essential in the strategy process and implementation, not much research addresses the interaction itself, in order to understand how it can be constituted and managed. More bridging research would be needed, as the communication of strategy cannot easily be isolated from the other activities in strategy processes, such as action and participation (Masalin 2014; Mintzberg 1994; Stensaker et al. 2008) and sensemaking (Weick 2001).

Research on international business and strategy has shown the importance of strategic inter and intra organisational knowledge flows in a global setting, especially in multinational companies (MNCs), at both a formal and informal level (e.g. Adler & Bartholomew 1992; Bartlett & Ghoshal 1987; Gupta & Govindarajan 1991; Kogut 2002; Noorderhaven & Harzing 2009; Snow, Davison, Snell & Hamrick 1996). The fundamental problem with large, multinational firms is their finding effective ways to manage the relationships, both vertically and horizontally, between business units, without risking long-term skill formation and organisational agility at the cost of short-run economic wins (Boxall & Purcell 2005, 277). The especial importance of informal communication in these contexts is indicated in essay three, where mid-level practitioners in supporting functions emerged to have essential practices communicating and making sense of the strategy in both local and global environments.

Strategic communication is about strategic *knowledge*, and strategy implementation involves sharing, creating and applying knowledge. Streams of strategic management research have addressed these complex processes, where knowledge is portrayed as a complex concept, combining theory and practice through learning processes, being both implicit and explicit, formal and informal, as well as individual and organisational (Small & Sage 2005; 2006). Knowledge is originally defined, and largely accepted in Western thinking, by Plato as 'a justified true belief' (Small & Sage 2005; 2006). It is thus a *relative* phenomenon depending on the context, the organisation, its people and ways of working. Hence, the knowledge needed in strategy implementation is not only about the strategy, but also about the organisation, and embedded in a web of social practices (Jarzabkowski & Spee 2009; Vaara & Whittington 2012). Knowledge is correspondingly related to power and action in social relationships (Foucault 1977; Knights & Morgan 1991). Furthermore, Alavi and Leidner (2001), Huber (1991) and Nonaka (1994) emphasise the importance of knowledge for increasing capacity for effective action.

The context-bound organisational knowledge is also *tacit*. Tacit knowledge in organisations has been discussed since Nonaka's launching of the concept in 1991, still, tacit communication has not really invaded as part of the strategy process. Studying the interaction within organisations is challenging because it is spread to *individuals* who are the primary actors in knowledge creation and storing (Grant, 1996), the most crucial sources of information (Cross, Parker, Prusak & Borgatti 2001) and in the core of dialectic knowledge creating processes (Nonaka & Toyama 2003). Social relationships of individuals are critical in the knowledge processes, as well as the mechanisms through which people learn and solve problems with other people (Cohen & Levinthal 1990; Cross et al., 2001).

Knowledge and learning processes become more and more important in the strategy processes, alongside formal communication, as the speed needed in strategy implementation increases. Wenger (2000) proposes understanding learning as a social competence and personal experience built on *human needs of belonging* and thus, related also to complex processes of *affect*. Employees implementing strategy in organisations need forums for the learning and knowledge processes. Wenger (2000) suggests *social learning systems* such as communities of practice (CoPs), where people can participate in order to share and create knowledge. CoPs can offer organisation members forums where people can informally share 'expertise and passion for a joint enterprise' (Wenger & Snyder 2000). According to Blankenship and Ruona's (2009) review, knowledge-sharing and social learning can be cultural, professional, practical and coordinating, taking place in a wide range of practical, social structures, such as strategic communities, CoPs and informal networks.

S-as-P research has contributed to the strategic management discipline by showing how strategic practices, to a great extent, are social human processes of, based on interaction, rather than hierarchical and structural undertakings (Carter et al. 2008; Clegg et al. 2011; Vaara & Whittington 2012). SAP research has increased the understanding of middle managers as communicators, knowledge creators and interpreters of strategy (Ikävalko 2005; Mantere 2005; 2008; Rouleau 2005; Vaara & Whittington 2012). Discursive analyses have made visible enabling and constraining strategy discourses, taken-for-granted perceptions and strategic activities and actors in the periphery of the organisation (Vaara & Mantere 2008; Vaara & Whittington 2012). Furthermore, SAP scholars have studied socio-material practices, such as meetings and workshops, having much potential in the field, and also material technologies, such as virtual meetings, and electronic voting becoming prevalent in contemporary strategy work (Jarzabkowski & Spee 2009; Vaara & Whittington 2012). This research resides in between SAP objectives, examining the perceived *deeds of interaction* in the organisational context of strategy processes that contribute to successful strategy implementation.

Lately, communications research has taken steps towards the field of strategy. Argenti, Howell and Beck (2005) claim that communication is the most important area of strategy implementation. They state communications should

not be a separated function, but instead everybody's work, integrated and aligned to strategy and involved in organisational networks, increasing awareness of strategy and access to information. Ståhle and Åberg (2015) in turn argue that organisations should be attuned to change, promoting dynamic systems with open, confidence-building communication, instead of control-based systems and top-down instructions. Furthermore, they claim that organisations should be seen as created with open, horizontal and bottom-up communication, as well as consisting of abundant, informal interaction (Ståhle & Åberg 2015). Juholin, Åberg and Aula (2015) state that current changes in strategic communication practices and perceptions of the role of organisation members call for a wider point of view and a new approach to the dominant, linear sender-oriented model of strategic communication. These authors suggest an *employee-oriented responsible dialogue* as a new approach, which is also clearly a relevant point for the research objective — uncovering the successful role of an employee in strategy process.

2.9 Managerial activity with practitioners in strategy implementation

In this research the main focus is on the practitioners' subjective perceptions of the strategic nature of their roles, but as the practitioners are part of the social environment within organisations and superiors and managers play a central role for the practitioners in strategy work, I seek understanding of the relationship between them within an organisational context. As Seeck and Parzefall (2008) also note, it is naïve to solely look at single or dyadic relationships, whereas cooperation, and thus also strategy implementation, demands multi-level social contacts between the actors. The research data include interviews with different kinds of actors, both practitioners and their superiors. Through these interviews, the practitioners' narratives and the cooperative research approach, I attempted to figure out the cornerstones of a balanced and successful practitioner-manager cooperative relationship.

Traditionally, the manager's role has been to *plan and formulate* the strategy and the discussion of strategy implementation has concentrated on organisational performance, in particular economic performance (Aaltonen 2007; Furrer et al. 2008; Jarzabkowski and Spee 2009; Vaara and Whittington 2012). Thinking and doing in the strategy process have been polarised to managers and respectively to employees (Mintzberg 1978; 1990; Senge 1990; 2006; Hrebiniak 2006) and the manager has often been treated as the only strategic thinker and actor (Aaltonen 2007). Hence, there is not a tradition or avenue of research focusing on the cooperation between managers and employees in strategy implementation. Instead of everyday cooperation with employees, the manager is expected to cultivate rational and effective activities. Rationality is often understood as — 'well planned is half done'. However, too much planning before action, accord-

ing to Weick (2001, 52-53), can induce seeing 'what really is relevant'. Similarly, most important for the manager, according to Kotter (2007), is being consistent with your words and being able to 'walk the talk.'

Management practices are essential in strategy implementation. Managers should clearly mediate the strategy and goals to employees so that they know 'what, how and when to do' in order to get things done, and also monitor that things get done (Yukl & Lepsinger 2007; Nohria, Joyce & Roberson 2003; Kaplan & Norton 2008). Teece et al. (1997) claim that more important than balance sheet items are managerial processes which support productive activity (Teece et al., 1997). Nohria et al. (2003) claim that basic management practices and skills are essential in successful strategy implementation, but instead of personal characteristics or decision-making skills, most important for managers is the ability to build relationships with people at all levels of the organisation. Prescriptive research that emphasised management activities in successful strategy implementation, such as monitoring, controlling and measuring the employee performance been criticized for example by Aaltonen (2007), Alvesson & Willmott (2002), Bakker & Schaufeli (2008), Clegg et al. (2011) and Wrzesniewski et al. (2013) arguing that similarly important, if not even more important, is encouraging people and cultivating the human capital. *Leadership* skills and practices are considered as equally important, even though more demanding for manager's successful implementation activities.

More than controlling, strategy implementation means *coordinating* people and processes, as well as knowledge and skills in order to achieve the goals of the organisation. Strategy implementation is about a good fit between strategy and organisation, as Galbraith (1983; 1986) states. Strategy implementation involves in practice activity and cooperation between management and employees within the organisation in concrete modes and episodes of knowledge sharing, meetings and workshops, which approach practice theorists Jarzabkowski and Spee (2009) and Whittington et al. (2006) suggest to be studied in more profound.

From a managerial perspective, and also within strategic management research, strategic communication is often seen to consist mainly of *formal communication*, while current research argues that the sensegiving and sensemaking of strategy are needed at all levels in an organisation, both vertically and horizontally, formally and informally (Balogun & Johnson 2004; Gioia & Chittipeddi 1991; Ikävalko 2005; Weick 2001). Communication and participation are important because they are closely linked to commitment (Kohtamäki, Kraus, Mäkelä & Rönkkö 2012). However, communication is not sufficient by itself in order to create action and change. In addition to communication, Ikävalko (2005) found that a superior's role is essential in encouraging people in their motivation, learning and feeling of empowerment.

Strategic management research has underlined the external and *explorative* practices of managers, rather than internal and *exploitative*. A balance between these is essential in order to both effectively use the internal resources of the organisation and to enable learning and innovation to create new potential and thus,

long-term organisational success (March 1991; Stenfors 2007). I believe it is important to study how this balance can be created and maintained in cooperation between managers and practitioners. Employees and the organisation's capacity to manage employees is a critical source for the organisation's sustainable competitiveness in rapidly changing environments. Thus, organisations need leadership that can translate the external demands to internal structures and processes that support its members to create organisation specific competences (Ulrich & Lake 1991). Managers should encourage and be interested in the subordinates' contribution, monitor and support performance as these leadership practices increase their subordinates' perceptions of trust and fairness, which go on to increase performance and positive citizenship behaviour (Dirks & Ferrin 2002; Podsakoff et al. 2000). Like Aaltonen (2007), I believe that strategic actions should not be regarded solely as managerial actions, but as actions taking place throughout the organisation.

3 METHODOLOGY

I will start the methodology section by clarifying my research intent and describe the approach and the underlying ontological and epistemological assumptions. I then discuss the methods that I have applied and the data I have collected according to these choices. The research process is described in detail in order to make visible the abductive, qualitative process of reasoning.

3.1 Research intent and approach

The abductive research process and grounded theory analysis require an open-minded ethnomethodological intent to understand the phenomenon in its own right, accepting the realities in the contexts, but at the same time not taking for granted the role that the employees are given when implementing strategy. In the qualitative analysis, I combine functional, interpretive and radical ideas within the organisational paradigm field in order to better understand a large and complex phenomenon (Ellingson 2011; Gioia & Pitre 1990; Mason 2006; Mohrman & Lawler III, 2012; Neuman 2002). Hence, I methodologically apply a 'middle-field' of organisational paradigms, however, starting in the first essays with more functional and objective grounds and gradually continuing towards more interpretive and radical avenues in this research report. Ellingson (2011, 595-607) talks about the 'middle ground' of research; a rich, varied and complex location, strategically and pragmatically blending elements of qualitative inquiry in a pursuit of positive social change.

Burrell and Morgan's research (1979; 2011) created the organisational paradigm fields suggesting grounding the research steadily in one chosen paradigm's tradition, but simultaneously they warned of extreme narrow views, encouraged stepping outside the functionalist paradigm and studying the other paradigms open-mindedly, in order to broaden the understanding of organisational and social phenomena. Even though Burrell and Morgan had a very

black and white view on the different organisational paradigms, already in the 1970s they had seen the barriers of different traditions intermingle, and since that time the perspectives and awareness of the different traditions have widened. Today, widely respected scholars, such as Mohrman and Lawler (2012) and Van de Ven (2007; 2011) even warn of applying narrow, single-discipline theoretical knowledge when aiming at solving the complex problems of modern-day companies and organisations.

There is a call in strategic management research for a theoretical and methodological pluralism and a new approach, integrating both the different traditions of social sciences and methods in order to develop the research and answer the complex challenges of managing diverse institutions, firms, non-profits and public agencies (Gavetti & Levinthal, 2004; Hoskisson et al. 1999; Mahoney & McGahan 2007). The strategic management research has developed gradually from an empirical and practical starting point to a more deductive, positivistic approach, emphasising industry-level economical phenomena, quantitative methods and large, global samples, and further partly back to firm-level, case-based, empirical researching, more relevant to actual business operations (Hoskisson et al. 1999). At that time, Hoskisson et al. saw that the future methodological directions for strategic management research would be a multi-paradigm approach, requiring varied theoretical perspectives and methodologies in order to explain complex firm performance. About ten years later, Furrer et al. (2008) argued that a more balanced view, involving integration between the different academic influences could be identified and seen to strengthen the field of strategic management. Understanding strategy processes is seen as particularly diverse and demands more dynamic, multi-paradigm perspectives (Pettigrew 1992; Schendel 1992; Van de Ven 1992). An integrated paradigm approach is needed in order to meet the theoretical and practical challenges of understanding a practitioner's activity and agency in the strategy process and its implementation. Bridging perspectives is also, according to Gioia and Pitre (1990) and Mason (2006), important to produce more comprehensive knowledge on a pioneering topic area and possible at a meta-level, if the research is not too rigidly confined to one single paradigm. Whittington et al. (2006) argue that practical activity in accelerating environments entails integrated, dynamic dualities, implying a blurring of boundaries, so that strategising and organising become similar or even common. Teddlie and Tashakkori (2011, 285-290) state that paradigm pluralism and methodological diversity are characteristics of mixed methods research and accepted as a tendency towards balance and compromise and a pragmatic choice of choosing and combining the best methods to answer the research question. Plurality of research perspectives and styles is typical in qualitative research (Locke, 2001, 19).

The middle field is not radically or critically emancipatory towards any approach and could be called 'the paradigm of positive organisational development', believing like Ellingson (2011) and Mason (2006) that research integrating several angles and mixing methods can enhance the creativeness and the logic of qualitative research and increase possibilities to understand each

case holistically, creating meaningful and empirically well-founded theory. This middle field has similarities to post-modern social research, a soft, integrative and pragmatic paradigm that emerged in the 1990s after an intensive period of 'paradigm purity' (Denzin & Lincoln 2011), trying to understand the contemporary world having common roots in humanity and existentialism (Neuman 2002; Gioia & Pitre 1990). These values are also embraced in this research, attempting to understand mid-level practitioners' realities in strategy processes, accepting the different levels of understanding, i.e. functionally understanding practitioners as loyal members of organisations, in a phenomenological, interpretive way, attempting to penetrate beyond superficial descriptions of appearance in order to understand activity and agency as parts of the phenomenon (Burrell & Morgan 1979; 2011, 242) and, from the radical point of view, wondering whether the employee's role needs a rethink in order to develop the employee's activity in the strategy process.

In the current research I attempt to cope with the challenges of paradigm pluralism by explicitly defining the philosophical stances of the research, grounding the research steadily in the strategic management tradition, taking different viewpoints and using different, complementary qualitative methods in the essays, as recommended by Cresswell (2011, 269), Eriksson and Kovalainen (2008, 211) and Mason (2006). A pluralistic view demands flexibility, reflectivity and creativity between theoretical approaches precluding extremely radical positioning. The S-as-P research I apply has according to Vaara and Whittington (2012) achieved a substantial methodological shift from statistical studies towards a variety of more qualitative methods and sociological theories, linking various streams of research and combining interpretive and radical ideas in order to meet the theoretical challenges and, at the same time, increase the practical relevance of the research. My aim is to continue on this path and add to the body of knowledge of understanding employee's perceptions and agency in strategy implementation combining related theoretical viewpoints and practice in an abductive process.

According to the chosen philosophical stances, I apply literature that shares the same basic values in the middle-field of paradigms concerning the studied phenomenon, i.e. the practitioner implementing the strategy. This middle-field can be ontologically characterised as 'realistic with functional goals', in order to create relevant and useful knowledge for organisations, but simultaneously a more nominalist view of subjectivist social reality. The interest is mainly interpretive and phenomenological, in order to understand practical action orientation, meaningful social interaction and the daily realities of people (Neuman 2002). Moderate realism goes well with human sciences, accepting that the research areas depend on human mind and culture (Raatikainen 2004, 82-84).

People are seen in a voluntaristic way, believing they are creative, feeling and active and having unrealised potential, but still bound by their working roles and thus not totally free to create their realities in work. The interest is in cooperative developing of working practices in organisations, but not in changing or criticising the organisational goals and structures. Epistemologically, the

research is mainly constructivist and relativistic, seeing the meaning as constructed and co-created by the subjects in their interaction with the world (Lincoln, Lynham & Guba 2011, 98-100). This is seen from the point of view of the subjects (Locke 2001, 8), still believing that there is a reality independent of our constructions (Coffey & Atkinson 1996) and equally understanding the realities in a real-life context and the subjects constructing that reality (Gray 2009). Extreme forms of relativist and constructivist views can be seen in sharp contrast to one another, but the more moderate views are largely accepted and even intertwined (Raatikainen 2004, 42-45). This kind of view is actually quite pragmatic, attempting to understand the phenomena in daily cooperation, within organisations.

These choices have been made to capture the human being in the processes, believing that working cultures can be developed in cooperation with the practitioners participating in the research. According to these philosophical stances and values, I apply multiple lenses (Ellingson, 2011) and qualitative triangulation in data gathering and analysis to get a more in-depth understanding of the cases. However, it is not just mechanical coding, it is done in a more sensitive manner, appreciating complexity and variety, as Coffey and Atkinson (1996) and Birks and Mills (2011) suggest. The approach is naturalistic, authentic and action oriented, attempting to make sense of and interpret phenomena in terms of the meanings people give to them, giving a voice to people and co-creating relevant constructs and results together with them, in the spirit of constructivism (Charmaz 2006; Denzin & Lincoln, 2011; Lincoln et al., 2011). Also applying engaged scholarship, a collaborative form of research engaging key stakeholders, researchers and practitioners (Van de Ven 2011). This kind of approach still represents a minority in strategic management research, while the mainstream research seems to largely suffer from stagnation in the functional field. I describe my idea of the paradigm using Burrell and Morgan's (1979; 2011) frame and underlying philosophical stances in Figure 5.

Moreover, my choice of philosophical stances can be related with new views of organisational research, called positive organisational scholarship (POS) (Cameron, Dutton & Quinn 2009), concerned with study of positive outcomes, processes and attributes of organisations and their members, focusing on dynamics described by words such as *excellence*, *thriving*, *flourishing* or *positive deviance*. There seems to be a clear call for more positive research. Cameron et al. (2009) present a set of related positive research avenues: positive organisational behaviour (Bakker & Schaufeli 2008), positive (organisational) psychology (Wrzesniewski et al. 2013), organisational development and appreciative inquiry — started by Cooperrider and Srivastva (1987), prosocial and citizenship behaviour and corporate social responsibility. The terminologies of these new views still vary. Accordingly, Bakker and Schaufeli (2008) suggest bridging the closely related research avenues. Cameron and McNaughtan (2014, 457) state that POS and positive change practices are not value-neutral but they advocate the position that the desire to improve the human condition is universal and that the capacity to do so is latent in most systems. According to the inter-

pretive constructivist logic, the research needs to be aware of the different viewpoints and values of social processes, rather than striving after objectivity, which has been a vacuum of the social context with different values and experiences (Charmaz 2006).

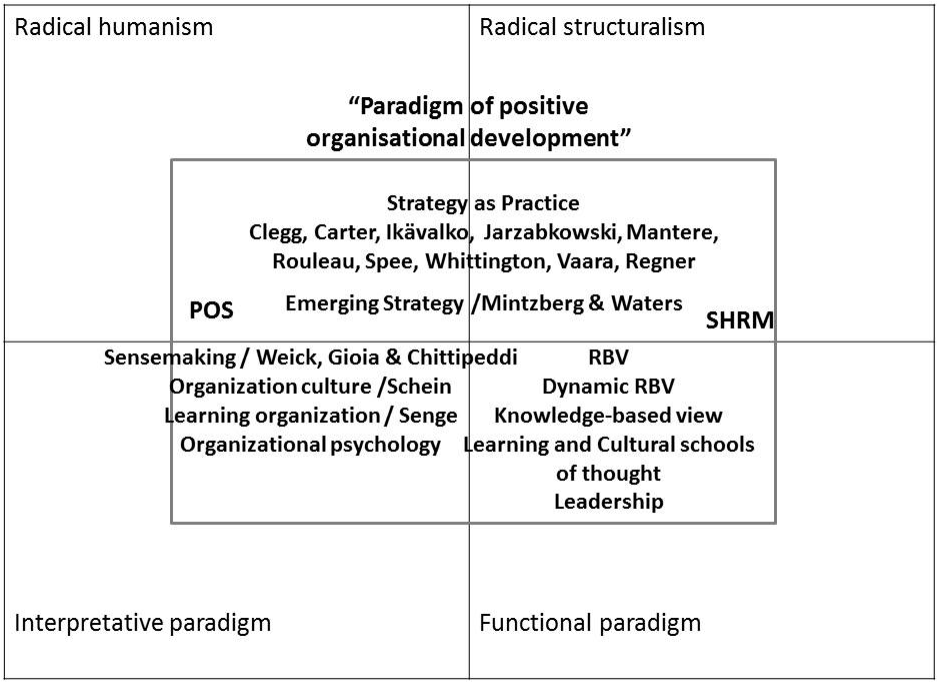

FIGURE 5 Philosophical stances and central literature for the research, applying Burrell and Morgan (1979; 2011), Gioia and Pitre (1990), Mason (2006) and Neuman (2002).

3.2 Methods

According to these philosophical values and stances, different *qualitative methods* are applied to create a deeper understanding of the phenomenon and to better answer the research question. Qualitative methods are particularly appropriate as I study a complex, real-life phenomenon: the practitioner's role in the strategy process and its implementation. Another reason for the choice is that qualitative research gives more reliable and relevant answers when the phenomenon has not been studied much previously from the perspective of the practitioner. Coffey and Atkinson (1996, 14-15) encourage exploring alternative research strategies and treating the data in different ways in order to produce rich and variegated analyses, rather than imposing a single methodological

framework. The essay structure of the dissertation enables the use of different qualitative methods and frameworks, and thus increasing the perspective and credibility of the research. The chosen methods, *multiple-case study*, *action research, grounded theory*, *narrative* and *ethnography*, fit well together, supporting and overlapping one another (Birks & Mills 2011, 30; Chase 2011, 423; Locke 2001, 18; Myers 2009, 53). All these methods help me to understand, interpret and construct the complex phenomenon of the practitioner's successful role in the strategy process, the dimensions of which are diffused to different research traditions and need to be integrated. Instead of trying to police the fluid boundaries of evolving research, Chase (2011, 431-432) encourages combining different methods and data sources to explore and better understand every day multiple, layered, but mundane narrative environments, the likes that may be found in workplaces and organisations, for example.

Constructivist and *ethnographic* intent is manifested through appreciating the practitioners as part of the world they described and understanding their emic constructs and narratives of their role in the social processes (Charmaz 2006; Silverman, 2001, 95). Ethnography demands sustained participation and observation in the participants' milieu, community or social world (Charmaz 2006, 21) and collaboration with practitioners, i.e. asking questions *with* the practitioners, not about them (Mohrman & Lawler 2012; Van de Ven 2011). Constructivist co-development means constructing and developing the ideal role in successful strategy implementation, together with the practitioners (Lawler & Worley 2011). Co-development comes near to Prahalad and Ramaswamy's (2004) ideas of co-creation of value, appreciating the dialogue and interaction with the practitioners as the experts of their own work. Cooperation is embraced in this research also by using several investigators and evaluators in the process gives different perspectives and novel insights to the study, enhancing the creative potential and confidence in the findings (Eisenhardt 1989; Eisenhardt & Graebner 2007; Van de Ven 2007; Yin 2009).

The research builds on a *multiple-case study,* applying Yin's (2009) concept of a case study as, an empirical inquiry that investigates a contemporary phenomenon in depth and within its real world context. The attempt is not to control or isolate the phenomenon from its context, but rather to study its real-life activities and perceptions, in order to get an objective view of strategy processes and practices within the organisations. The analysis seeks a systematic internal and external evaluation, as Yin suggests (2009). Still, the research is not looking for variables and causalities in a positivistic way, but attempts to understand the phenomenon and constructs of people holistically and more profoundly (Piekkari and Welch 2011). Holism can even be regarded as a distinctive, characteristic feature of human sciences (Raatikainen 2004, 87). Even though the aim is to be able to make some generalisations, the main interest is in particularisation, as Stake (1995) suggests, in order to understand the practitioners' roles in their uniqueness in the existing contexts, instead of working with too strict methods for comparing and finding differences with other cases. This case study is instrumental in the sense that the research question is more important

than the cases (Stake 1995). Hence, the study is interested in the practitioners and their practices in the context of strategy processes.

Multiple-case studies provide more information on complex phenomena, but simultaneously demand a well-defined focus (Eisenhardt 1989; Eisenhardt & Graebner 2007; Van de Ven 2007; Yin 2009). In this study, the research problem was relevant, coming from a real need in practice to make the focus clear (Edmondson 2011; Mahoney & McGahan 2007). Yet, the research question has been rather broad, making it possible to gather the data in an open-minded way, thus avoiding bias and too limiting *a priori* constructs (Eisenhardt 1989). While an inductive approach warns for a priori constructs and too limited research focus, Yin (2009) claims that the research gains from prior development of theoretical propositions, guiding data collection and analysis. Hermeneutic reasoning is similarly based on prior knowledge as a prerequisite for understanding (Myers 2009, 186). The abductive process navigates between these opinions, as Charmaz suggests (2006).

Action research was chosen and applied to increase understanding of real-life challenges with strategy implementation and practitioner roles, believing like Myers (2009) and Stringer (2007), that action research increases the quality, relevance and reliability of the research. Traditional research methods can give a whitewashed or remote picture of reality, as informants may answer interview or survey questions more positively than they would act in reality, or the questions do not capture the truly relevant issues for them. This research embraces the original and dynamic integrating approach of Kurt Lewin (1946), which combines action and research in holistic and complex social systems. Lewin has emphasised that change requires action and providing a process whereby the members could be engaged in and committed to changing their behaviour. To be effective, change must take place at the level of people, and the process must be participative and collaborative, involving those concerned (Burnes 2004; Lewin 1946; Stringer 2007).

Action research has been an emotive topic of discussion in research ever since Lewin's work, published nearly 70 years ago. The critique against action research has often had its origin in a deductive, positivist logic of explanation, instead of an aware and explicit process of reflective learning and interpretive understanding (Burnes 2004; Cassell & Johnson 2006; Gray 2009; Locke 2001; Stringer 2007; Susman & Evered 1978). Susman and Evered characterise action research as future and development oriented, unpredictable, situational and collaborative. Another source of critique has been the wide range of forms that action research takes in practice. According to Cassell and Johnson (2006), its variety of applications is a strength and adds richness, yet it also demands an explicit stance of epistemological and ontological logic.

This dissertation applies action research believing like Raelin (1999) that knowledge should be produced in the interplay of knowledge and action, without separating theory from practice and emphasising a collaborative approach, combining scholars and practitioners. Moreover, like Susman and Evered (1978), I believe that action research generates theory grounded in action and

knowledge that has greater potential for understanding and managing organisational issues than positivist science. Stringer (2007, 1-11, 191) states that action research is a legitimate, authentic, and rigorous approach to inquiry, being a principled, systematic and empirical way of research enabling strategic thinking and acting, sustainable change and development in community and building relevant theories emerging from the hermeneutic dialectic, meaning – making and problem solving dialogues between stakeholders, enhancing understanding and solving complex, real-life problems. Cooperrider and Srivastva (1987) even claim that action research has the potential to become the paradigmatic basis of a truly significant, generative science of administration.

Charmazian Grounded theory (2006, 8-10) is also applied, emphasising the creativity and flexible guidelines of the analysis in the original spirit of Glaser and Strauss from 1967, updated with twenty-first century methodological assumptions and approaches. Like Charmaz, I believe that theories are not discovered but instead we are part of the world we study and the data we collect. Grounded theory is thus constructed through our past and present involvements and interactions with people, perspectives and research practices. The original grounded theory approach entails simultaneous involvement in data collection and analysis, constructing analytic codes and categories from data, comparisons during each stage of the analysis and advancing theory development during each step of data collection and analysis. This kind of a grounded theory meets the criteria of having a close fit with the data, usefulness, conceptual density, durability over time, modifiability and explanatory power (Myers 2009). The main advantage of a grounded theory approach is that it enables a systematic and detailed analysis of the data, being particularly useful for studying regular, repeated processes, such as activities within a strategy process. Birks and Mills (2011) see grounded theory as a dynamic, flexible, fluid and evolving process, giving tools to maintaining an *audit trail*, however demanding good planning and focus. Locke (2001) states that grounded theory is particularly appropriate for researching complex organisational behaviour, as it offers the possibility of creative understanding, it links well to practice, supports theorising of new substantive areas and enlivens existing theoretical frameworks. Coffey and Atkinson (1996, 10-11) remind us that analysis is not about using a correct set of techniques, but is an imaginative, artful, flexible and reflexive process, and whatever research strategy is followed, the analysis should be part of an overall methodological approach and scholarly rigorous. Ethnographic grounded theory gives priority to the studied phenomenon or process, rather than the setting itself, and aims at a conceptual interpretation and rendering (Charmaz 2006, 22). In this research the aim was to construct the practitioner's active role in the strategy process in close fit with the data and through interaction with practitioners gaining deeper understanding of complex organisational behaviour, and thus increasing the usefulness, relevance and rigor of the research.

Additionally, the research benefits from *narrative* methodology that emphasises the researcher working closely with individuals and their stories

(Chase 2011, 423). A narrative approach is utilised mainly as an in-depth narrative interviewing, but also as a narrative analysis, meaning a mode of analysis that organises and interprets data, and describes and constructs the role of a strategically active, mid-level practitioner (Chase 2011, 423; Eriksson and Kovalainen 2008, 210-218). For this endeavour, I have chosen particularly interesting practitioner roles to be co-constructed from the data for the research question, written down and analysed more profoundly. A good relationship with the narrators enhances the trustworthiness and relevance of the stories, and thus the validity of the analysis (Chase 2011, 424).

The main focus of the narrative analysis is on the *meaning*, i.e. the content of the narrative (the practitioners' practices, activities and interaction), but to some extent, it also is on *how* the story is told (expressing a feeling of empowerment or engagement) or what the *settings* are, i.e. type of organisation, local or global interaction (Eriksson & Kovalainen 2008, 218). The elements of the narrative analysis can be summarised, as Coffey and Atkinson (1996, 58) suggest, in an *abstract* way, i.e. defining the practitioner's role in the strategy process as *orientation,* i.e. how, when and with whom the role is played; *complication*, i.e. sensemaking of the central turning points, crises and problems of the strategy processes; *evaluation*, i.e. why is it important; and finally *result*, i.e. understanding the practitioners' roles from their angle and understanding the tools that are needed to develop the role. In line with a constructivist approach, the stories were constructed cooperatively with practitioners.

Ethnographic research focuses on interpretation, understanding and representation, studying how people interact with one another and with their environment in order to understand their culture and the cultural sensemaking, as close as possible to the practices of everyday life — for example, in formal and informal organisations and workplaces (Eriksson & Kovalainen 2008, 137-153). Like Silverman (2001, 43-82), I believe that ethnographic observations, interwoven with data collection and theory building in the pursuit of understanding what people actually do, have the potential to contribute a great deal to understanding how organisations function. The main goal of ethnography is to gain an insider's perspective in the studied topic through using open-ended questions, letting participants talk with their own words, being a good listener, showing genuine interest towards the participant and making the interview situation comfortable and relaxed (Charmaz 2006, 23; Eriksson & Kovalainen 2008, 146). Perhaps the main problem with ethnography is seeing data everywhere and feeling the need to master it all (Charmaz 2006, 23; Coffey & Atkinson 1996). The risk can be uncritically adopting a participant's views (Charmaz 2006, 23), while aiming at giving participants a 'voice'. Moreover, the problem can be superficial, random data collection and reliance on stock disciplinary categories (Charmaz 2006, 24). These problems I have attempted to overcome in data gathering through focusing strictly on the research questions that aim at filling in a clear gap in strategic management literature and having a clear in mind the research problem garnered from practice. Ethnographic validity is assessed according to theoretical sincerity, having a clear 'road map' and field

note evidence. Consistent with Sanjek's (1990, 395-404) recommendations, this research started with recording wide-ranging field notes on a net of people, places and activities, but the terrain is filtered through theory followed by theoretical sampling and more selective and systematic observations. This process is explained in section 3.4 — The research process.

3.3 Data, cases and participants

The empirical data was collected in a procedural manner, partly collaboratively in a pursuit of an all-encompassing logic of design, data collection and analysis throughout the project, as Yin (2009) suggests. Cooperation in data gathering and analysis not only increased the amount of the data, but also widened my ability to understand the phenomenon from several angles and increased the confidence in what were the most important issues in order to answer the research question. The comprehensive preliminary work and surveys doubtlessly increased my understanding of the phenomenon more holistically, and can thus have enhanced the theory building process (Eisenhardt 1989; Eisenhardt & Graebner 2007; Van de Ven 2007; Yin 2009).

The theoretical selection of *cases* and *participants* on qualitative grounds enabled the choosing of cases that were of general interest and were as theoretically useful as possible, enabling a relevant and holistic picture of strategy processes in different kinds of organisations to be gathered (Eisenhardt 1989; Locke 2001; Mahoney & McGahan 2007). Owing to the cooperative preliminary work, I had interesting cases and practitioner roles, among which I could choose the ones that had the most potential to answer the research question. In this selection, however, the practitioners' roles were more important than the cases, the meaning of which was mainly to provide a wide enough context for the studied phenomenon. The cases were small, middle-sized and large organisations, privately owned, municipal, selling and producing, as well as non-profit organisations. The cases represented different industries and businesses, such as services, communication, daily and durable consumer goods, technical devices, professional products and solutions, construction and renovation, forest industry and financing (see Table 3).

During the research project, I conducted additional interviews in order to get a more comprehensive perspective. I 'placed' some chosen practitioner roles in similar organisation contexts, e.g. I presented an assistant role that had relevance for the research question as part of a similar case that I had already chosen for the research. The benefit of this procedure was that I did not need to increase the amount of cases, if I already had a similar case (e.g. a global middle-sized sales organisation in the same business area, with similar ways of working). This way I could work on a sufficiently descriptive, yet compact and manageable, amount of cases and contexts — which would also benefit an outside reader or evaluator of the research. Because of this, the total amount of the

studied cases is larger than those shown in this report. As an example, in the data I had three interesting, small, global, non-profit organisations which had clear similarities in terms of their strategy work and practitioners' roles, but for this final report I chose to mention just one of them.

Instead of random sampling, a theoretical selection of participants was adopted, in the spirit of Charmaz (2006). This was done in order to capture the perceptions of both managers and practitioners with a good picture of the strategy work in practice within the organisation. In an attempt to achieve a deeper understanding of the practitioner's activity and agency, the participants were chosen according to their activity manifested in the practices and activities they had in the strategy processes and the explicit professional role they played in the strategy implementation. Hence, novices and beginners were not selected, but instead competent and proficient employees, who were experts of their own work within the organisation. In the qualitative analysis, background variables such as gender, age or tenure *per se* were not regarded as essential in answering the research question, as the aim was not to uncover larger social emancipatory findings. Choosing participants this way enabled focusing on understanding the *positive ways of working*. There is already comprehensive literature regarding implementation problems and obstacles (e.g. Balogun & Johnson 2005; Hrebiniak 2006; Nutt 1999).

The cases and participants analysed in this dissertation are presented in Table 3.

TABLE 3 The studied case organisations and participants

Organisation	**Data sources for analysis. Selected mid-level practitioners are emboldened**
1. A large private Finnish company and subsidiary to a global provider of facility services, with more than 10,000 employees in Finland.	Project manager, **management assistant** and **HR Coordinator**
2. A medium-sized, multicultural, northern-European sales company's headquarters, with nearly 200 employees and with a parent company in Europe. Part of a global group manufacturing and selling durable consumer products.	Strategic manager and **CEO Executive Assistant, HR Coordinator**, a survey of middle managers and practitioners, 57 respondents out of 160
3. A large company with plants in Finland. A subsidiary to a global company, with its HQ in Europe.	Directors of Development and Communications, **Communications Specialist, six management assistants**
4. A large private Finnish company, with levels from owners to cooperative units, along with their trade unions, working committees and the cooperative parent company. More than 10,000 employees	Strategy manager, Service manager, **11 middle managers**, 1 assistant
5. A large company in the construction and renovation industry. Headquartered in Finland. 50,000 employees globally.	**HR manager** responsible to HR director. CFO's presentation of strategy processes in practice
6 A medium-sized, Finnish subsidiary and local part of a large industry company, with	Company's HR Director, HR Specialist, Management assistant to CEO of subsidiary,

(continues)

TABLE 3 (continues)

10,000 employees. Headquartered in Finland.	**Executive Assistant of regional plant**
7. A large subsidiary in the financial sector, with 2000 employees in Finland. Northern-European headquarters with c. 20,000 employees globally.	**Management assistant** in a team responsible for strategy implementation actions, with 300 hundred practitioners in Finland
8. A large, Finnish, traditional producer of consumer goods. Employing about 3000 employees and a sales organisation, with about 300 employees, based in Russia	**Strategy Director, Export Director,** CEO Executive Assistant **in a parent company. CEO** and managers of marketing, logistics and administration in a subsidiary, previous interviews among employees in the parent company
9. A medium-sized subsidiary in Finland, with ca. 150 employees. Headquartered in Europe, part of a global company.	**Management assistant, Communications Coordinator**
10. A large Finnish subsidiary to a Northern-European company in the communications sector. Employing c. 30,000 globally	Area manager and **Head of Support Office**, i.e. supervisor of management assistant pool
11. A medium-sized private sales company, with c. 400 employees in Finland. Headquartered in Europe, and part of a global chain, selling consumer and professional products and solutions	Development Director, **Marketing manager, HR Specialist**
12. A small Finnish, privately owned, non-profit foundation, with 70 employees and a clear global mission.	CEO and **Office Manager**
13. A small Finnish producer and seller of consumer products, with 60 employees globally.	North American Sales Manager, **HR officer**
14. A small municipal organisation	**Communications Secretary**

Theoretical sampling has been applied in the manner of Charmaz (2006, 96-107), who suggests not to settle on the initial sampling of cases and interviewees, but urges *returning to the field* and seeking more pertinent data in an abductive process, to elaborate and refine the properties of the categories of the emerging theory, thus raising the depth and analytical level of the reasoning. According to Charmaz, an early, closed theoretical sampling can lead to trite, unfocused or unspecified categories. In my process, I dug deep in co-creating the mid-level practitioner's stories of their roles in strategy implementation.

The data were rich and detailed, gathered in an open-minded iterative process. The qualitative approach demands a sensitive encountering of the participants in order to give them a voice, letting the interviewees talk about the practices and processes in their own words and not guiding the interviews too strictly. This kind of interviewing can be called *active* (Silverman, 2001, 95) or *intensive,* fitting particularly well with constructing grounded theory (Charmaz 2006, 25-35). It is important to help the interviewees to focus on the research topic, i.e. the strategy implementation and the practices and perceptions they had in their role. In qualitative interviewing, the researcher needs to ask 'what' and 'how', to observe, as well as listen and try to understand the participants' meanings and under-the-surface meanings, their organisation culture, ways of

working, acting and interacting, as seen by themselves. Yet, according to Charmaz' (2006) and Silverman's (2001; 2010) recommendations, the researcher must also keep the discussion focused on the main research question.

Qualitative interviewing requires an attempt to understand the practitioners' point of view and working culture. The researcher cannot solely rely on the 'planned in advance' interview questions, but needs to help the participant to reflect on the different dimensions of the researched topic within the context. Relevant issues that are not anticipated may emerge during the qualitative interviewing. As the strategic issues are not always self-evident to employees, some concepts might need to be explained or discussed, in order to see that they are similarly understood. The practitioners may need to be encouraged to reflect on why they do the activities they do and to express their perceptions truthfully. The interview themes were planned according to the research question and with the help of the literature, as well as research conducted for similar purposes and my own preliminary ideas from the field. The themes are presented separately in the essays and the themes that emerged as most important are discussed in the GT process.

The interviews took approximately one to two hours and were recorded and documented comprehensively in detail, to enable abductive processing and iterative analysis. The interview results and observations were colour coded, categorised and built into mind maps, memos and tables, in order to understand the dimensions, similarities and differences of the phenomenon and the related phenomena. Rewriting the practitioners' narratives enabled portraying their role and uncovering the most essential interlinked elements. In order to truly convey the practitioners' emic thoughts, in the manner of constructivism, it is essential to check and discuss the documentation with the participants and co-develop and co-create further the ideas with them after the interviews as well (Lawler & Worley 2011). The longitudinal contact with the practitioners in the organisations permitted observations on the changes and development in the strategy processes and practitioners' roles. Cooperation with the participants is described in Figure 6.

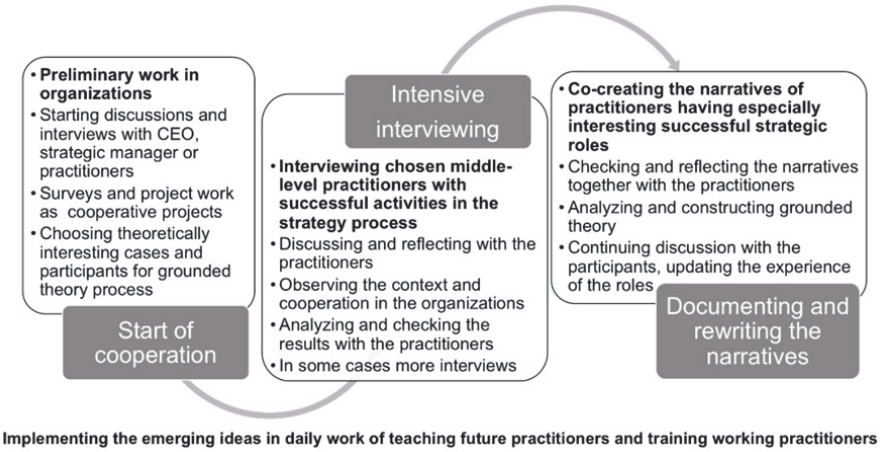

FIGURE 6 The cooperation process with the participants

3.4 Research process

The research process was *iterative, interpretive and emerging*, which, according to Charmaz (2006), Eriksson and Kovalainen (2008), Van de Ven (2007), Van Maanen, Sörensen and Mitchell (2007), is the most natural process to understand a multifaceted, complex, real-life phenomenon, such as uncovering the practitioner's role in strategy work. The iterative process was *abductive* and *circular*, grounded in empirical reality and including both *inductive* and *deductive* analysis, in an interplay between theory and method. It evolved from multiple cases and traditional strategic management angles, to single case activities in longitudinal real-life action research and the individual practitioners' roles and stories. This meant theorising through the emerging constructions constituting the practitioner's role and agency when implementing strategy. Moreover, the process was *dialogical*, involving the practitioners and seeing them as active subjects instead of passive objects, and thus, entailing reflective learning by those involved (Cassell & Johnson 2006; Eriksson & Kovalainen 2011). The ethnographic and grounded theory process, support each other in interweaving data collection and theory building as the research progresses (Locke, 2001, 18).

The process has meant constant comparative analysis, coding, categorising and conceptualisation in a critical, cognitive process that involves creativity, as Birks and Mills (2011), Charmaz (2006), Locke (2001) and Myers (2009) suggest. Coding helped to simplify and reduce extensive data, but could also be used to expand, transform and re-conceptualise data, as well as open up more diverse and creative analytical possibilities (Coffey & Atkinson 1996, 28-30, 37). The process has moved back and forth between 'the forest' and 'the trees' (Ellingson 2011), starting with the big picture of the research problem, studying several cases and themes and the interlinked essential elements, continuing then on to the details of the data, and finally integrating the elements, concepts and constructs back into the big picture in order to constitute the successful role of the practitioner in strategy implementation.

Additionally, this circular process can be related to the reflection in a *hermeneutic circle*, a process of understanding, constructing and working towards a meaningful, deeper interpretation (Eriksson & Kovalainen 2008). Hermeneutic understanding is created by constantly moving from the phenomenon as a whole to its parts and back (Myers 2009, 185), i.e. from organisational processes to micro-level activities and back to understanding how the micro-level activities can be part of an active and empowered practitioner's role in successful strategy implementation. In my process, the reasoning started at the organisational level, understanding the strategy as a means to achieve the organisation's goals, then continued to the micro level, studying people's activities in practice, and finally combining the levels in order to understand how a successful implementation can be constructed. Similarly, Vaara and Whittington (2012) claim that a practice-based approach increases understanding of the concept of agen-

cy at the micro level, while aiming at understanding the macro. In Figure 7, I illustrate abductive reasoning in a simplified, hermeneutic circle, as I see it.

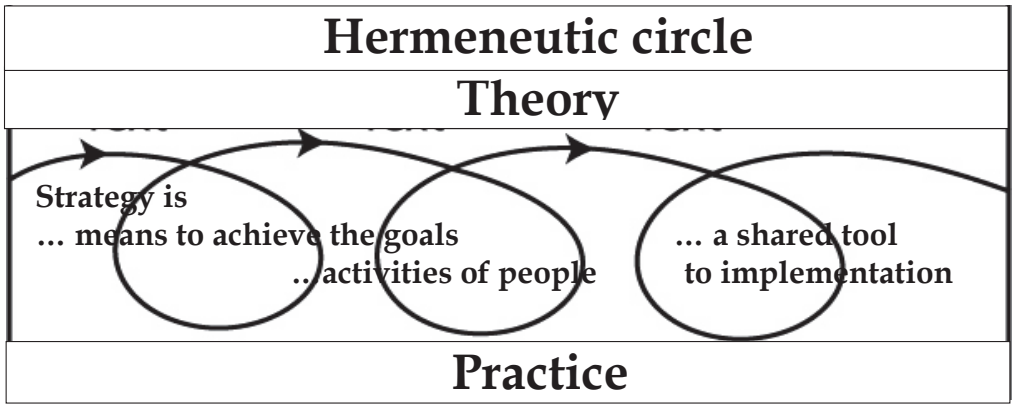

FIGURE 7 Applying abductive reasoning in a hermeneutic circle

Additionally, the process of analysis can be described with Van de Ven's (2007; 2011) diamond model of *engaged scholarship*, see Figure 8. Engaged scholarship is a collaborative form of research, engaging key stakeholders, researchers and practitioners. It starts from problem formulation through extensive dialogue with people from the field who know the problem, as well as reviewing the literature, to building a preliminary insight of the phenomenon. It continues with open-minded theory building and research design, with several alternative models in an iterative process, engaging experts in relevant disciplines and functions and solving the problem through communicating, interpreting and applying the empirical findings. The way in which *engaged scholarship* has been applied in this research is described in Figure 8.

I will now describe, phase by phase, the iterative research process, navigating between practice and theory. The process is demonstrated visually alongside, in Table 11 (Appendix 1). However, the process description is simplified and the main phases are separated, even though the real process did not have clear phases with beginnings and endings, but returned repeatedly back, reflecting again, learning and defining the direction. Similarly, Charmaz (2006) points out that the advantage of a qualitative research process is that it allows the researcher to learn during the whole process, and thus, increase the quality of the inquiry. I go through the phases of research in more detail in the following section.

The *process started* with defining the *phenomenon* according to the *research problem* as 'an employee's role in the strategy process and its implementation'. The *first* phase of the process started before writing the dissertation in form of an extensive preliminary work as a cooperative research and development project on the basis of the preliminary idea I had had of the research problem. More

than 20 organisations' strategy processes and strategy work were studied. The gathered data were analysed multi-methodologically and collectively by more than 20 bachelor and master students, through their theses, supported and evaluated by their supervisors and commissioning parties. Information was gathered through surveys, interviews and action research, to get richer descriptions of the phenomenon. Systematically documented concrete development was carried out with the organisations. My role in the project was threefold; I was the project manager, a thesis supervisor and a researcher. I conducted interviews as well and was involved in all the phases of data collection and the development processes in the organisations.

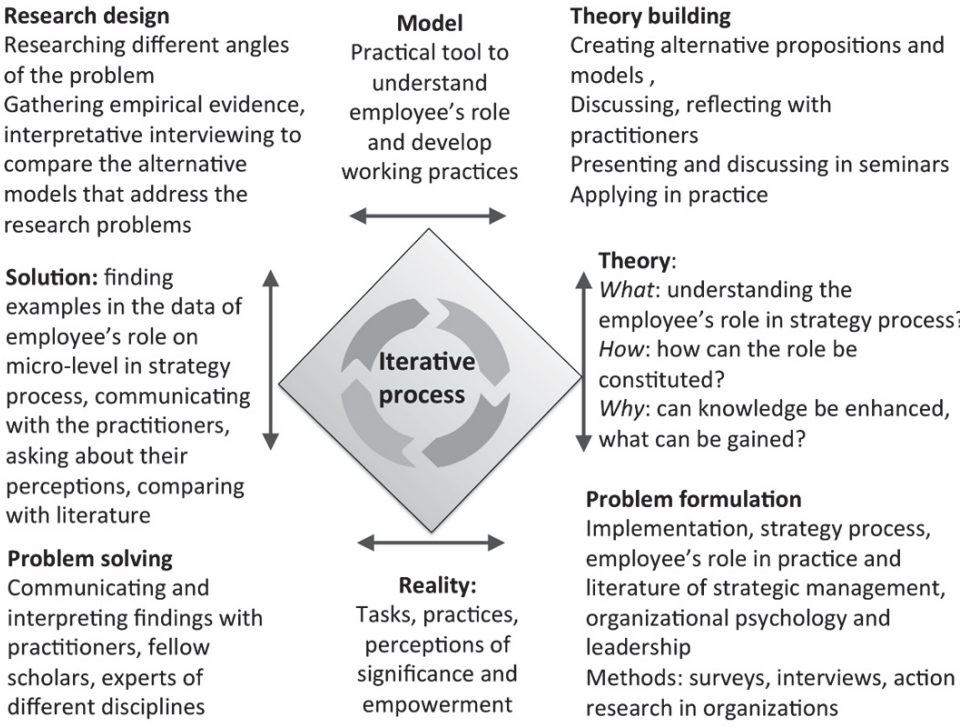

FIGURE 8 Applying Van de Ven's (2011) diamond model of engaged scholarship

According to my *preliminary idea* coming from the literature, I asked the interviewees questions around rather traditional and broad themes; leadership and management, communication and interaction, learning and knowledge, organisation culture and the employee's role. The basic idea of open-ended interviews was appreciated during the whole research project, but over the course of the process I learned more and could ask more relevant questions, got more out of the interviewees and applied more narrative styles. Throughout the research process, I constantly returned back to the memos and recordings I'd made, as I learned more and found 'new' details to complement the picture of a practitioner's role in the strategy process. Most of the cases were the same throughout

the whole research process and I could conduct more interviews in the same context, in order to complete the picture of the practitioner's role.

In the *second step* of the research, I was able to focus more precisely and work on different dimensions of the phenomenon. As the first phase of the research proved that the employees' role was not acknowledged in the extant strategic management research, I started studying more 'human' approaches — such as learning, cultural schools of thought and organisational psychology and the S-as-P literature. It became clear that different forms of interaction were more relevant from the employees' point of view than the mainstream literature admitted. At the empirical level, I studied the practitioners' practices and factors they perceived as enhancing their activity though in-depth interviewing.

In search of understanding the activities in a real-life context I took a leave of absence from my teaching duties and participated in implementing a strategic project in one of the case organisations. Theoretically, this phase can be called *longitudinal participative action research,* 'testing' the results gained in the first phases of the research, including some deductive reasoning. During this time working in the case organisation I wrote the fourth essay. In this phase, I also had the possibility to combine another path of research and results from the cooperative project that aimed at understanding and developing cooperation between sales, marketing and communication in organisations. The data from this project included survey answers from around 500 and theme interviews with about 50 practitioners. The literature review was extended to more practical strategic marketing and sales management, as they had a relevant and central context for implementing strategic change.

The action research phase was an eye-opening one for the whole research process. As described by Stringer (2007), I also noticed in practice how the traditional research methods can fail to capture the research participants' real perceptions and activities. Moreover, the interaction, action and cooperation between people proved to be even more relevant and challenging than I had previously understood. Thus, the extension of methods substantially improved my understanding of the phenomenon in practice from the practitioners' angle.

In the *fourth phase* of the research I continued studying the micro level from the individual employee's point of view, and collected mid-level practitioners' narratives of their practices, activities and perceptions in strategy processes. In addition to middle managers — who, as shown in previous research, have been acknowledged to play an essential role in strategy processes — management assistants, HR and communications officers told stories of capital relevance for understanding and developing the communication and implementation of strategies. A new line of literature on employee's engagement and 'thriving' at work was emerging, offering new ways of seeing the employees' role and empowerment.

In the *final phase* of the research, I attempted to find the linkages and relationships between the essential elements of the mid-level practitioner's role in the strategy process from all the essays (1.-5.). At the theoretical level, I sought to draw a synthesis on the basis of the findings in the data, how the concepts

manifest in these contexts and the extant theories constructed on these concepts. I attempted to bridge the constructs between the research of strategy and organisation. According to Floyd et al. (2011), this kind of integration would bring advantages to a holistic understanding of organisations' strategy processes and the messy nature of the working practices within organisations. As Floyd et al. (2011) recommend, I try to meet the challenges of the boundary-spanning perspectives that imply new conceptualisations to make them compatible and coherent within the overall scheme. In so doing, I apply reason and interpret and construct my story of the practitioner's point of view in the strategy process in order to better understand how a successful practitioner's role can be constituted as part of the organisation's strategy processes.

4 THE GROUNDED THEORY PROCESS OF ANALYSIS AND DISCUSSION

This thesis addressed the perceptions of the largely neglected mid-level practitioners and their role in strategy implementation. In particular, successful roles were searched in order to understand successful performance. In this chapter, I describe how the grounded theory process of analysis proceeded, following Charmaz' (2006) ideas of constructivist grounded theory, diverging from the positivist and objectivist approaches. The iterative process of analysing started with the defining of the research problem and the practitioner's role in a strategy implementation that often fails. Accordingly, the research question was formulated to: **How can a practitioner's successful role be constructed in strategy implementation?**

In practice, the grounded theory phases are blurred and overlap each other. Nevertheless, the grounded theory logic assists in maintaining the *audit trail* and communicating the phenomena, their properties and relationships, increasing the analytical level of conceptualisation and quality of reasoning as Charmaz (2006), as well as Birks and Mills (2011) suggest. *Memos* and *working documents* are essential tools of this process as they enable conceptualising and lead to theoretical sampling and refining the emerging categories. While my first memos were detailed descriptions of the practitioners' activities and practices in the strategy processes, the second phase of 'memo-ing' was concluded in the form of comprehensive tables and written and visual mapping. This allowed me to explore, interpret and compare the components and relationships of the phenomena. Sorting, diagramming, mapping and integrating were used as tools to develop categories for the practitioners' expressed perceptions, actions and practices in strategy processes. Owing to a constructivist, cooperative approach, I could gather comprehensive, emic, and in some cases, longitudinal data, with practitioner's that participate in the strategy processes and implementing strategy within their organisations.

During the whole grounded theory process I attempted to narrow the focus of the emerging categories, refine the analysis and compare the categories with empirical realities, and thus, increase the theoretical logic of the analysis as

Charmaz (2006, 96-113) and Eriksson and Kovalainen (2008) recommend. Hence, the research started with a broad wish to understand and enhance strategy implementation processes, but the focus narrowed down, first to mid-level practitioners' practices and perceptions when implementing strategy, and then further, to their perceptions of their role, identity and engagement in successful strategy implementation. This narrowing is important because understanding complex organisational phenomena demands an understanding of the fragmented sociocultural cognitive activities at the micro level. However, the researcher needs to bring the story back to theoretical levels towards the final phase of the research.

4.1 Data gathering and initial sampling

Data gathering and *initial sampling* started with an attempt to grasp the totality of the phenomenon with its dimensions and interrelated concepts. I interviewed managers and practitioners to get an understanding of strategy processes and the practitioners' roles in them in different kinds of organisations. The initial sampling of the *cases* was conducted on a theoretical basis, according to Eisenhardt's (1989) and Mahoney and McGahan's (2007) suggestions, choosing different kinds of organisations, large and small, private and non-profit, global and local. The aim was to understand successful processes, so rather well performing organisations were chosen for study. However, the focus was on the practitioners and their practices, instead of the outcomes of the organisations, or simple causal relationships between the dimensions of the phenomenon.

The practitioners were carefully selected so that they had a good picture of the strategy process in the organisation and knew the actions involved in strategy implementation. The selection was made together with CEOs, strategy managers and also by directly approaching practitioners known to have practices and relevant experience in strategy processes. These interviewees were found through the researcher's longitudinal professional cooperation and relationships with thousands of practitioners, in the role of a teacher, thesis supervisor and project manager, in a university of applied sciences.

Some generalisations could already be made during the preliminary work phase by comparing the processes inside the organisations, for example, that private selling companies and non-profit organisations had, against my prior expectations, very similar strategy processes. Instead the size of the organisation seemed to have more relevance for how the role of the practitioners appeared. However, the selection did not solely seek to gain replication or representative logic, which is a positivistic way of sampling. Rather, in grounded theory logic, the *theoretical sampling* is essential during the whole research process, meaning the gathering of more data to refine the categories and their properties in the emerging theory (Charmaz 2006, 96-100). *Grounded theory saturation* is not about witnessing repetition of the same events or stories, saturation

was gained when the theoretical conceptualisation of the practitioner's successful role in the strategy process and its implementation started to emerge and new data did not spark new theoretical insights or reveal new properties of theoretical categories, as Charmaz suggests (2006, 113). Accordingly, the theoretical sampling continued in the following phases of the research.

The starting phases of the grounded theory process are described in Figure 9. The boundaries of the phases are blurred because of the iterative nature of the process.

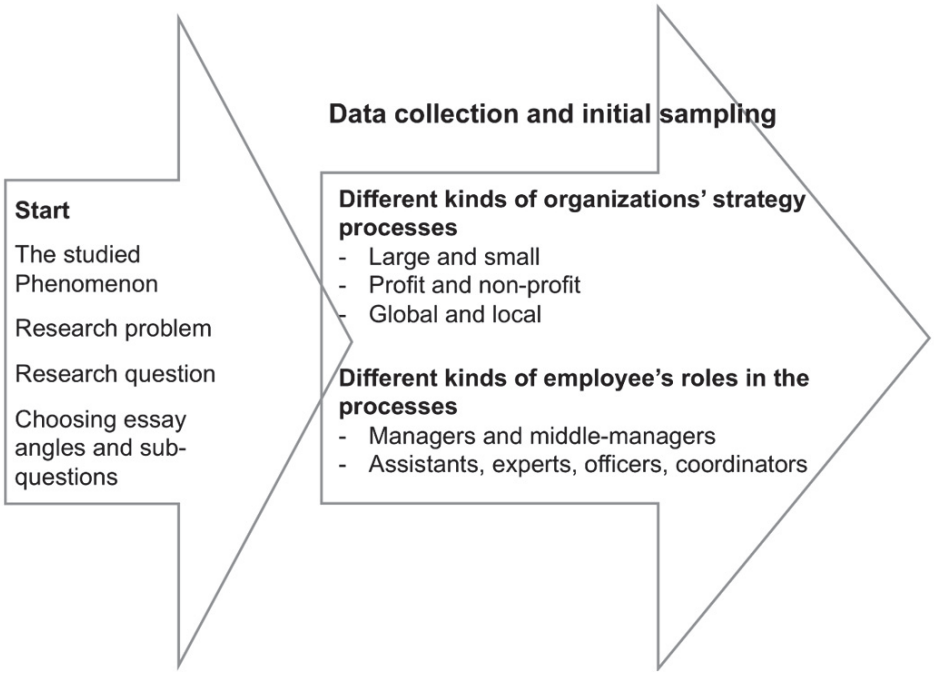

FIGURE 9 The starting phases of the grounded theory process

Intensive interviewing following Charmaz' (2006) and Silverman's (2001/2010) recommendations was found to be useful in order to gather rich data of practitioners' roles in strategy processes and implementation, and in order not to delimit any essential dimensions of the phenomenon in practice. Intensive interviewing and grounded theory methods fit well together, being both open ended but directed, shaped yet emergent, and paced yet flexible (Charmaz, 2006, 28). Moreover, the attempt was to give voice to the practitioners in the strategy processes, as their sentiments are not always asked about, even though they are supposed to implement the strategy. Giving voice meant listening intensively to the practitioners' explanations and seeking to understand their point of view. Moreover, memos or narratives of the documented interviews were checked by the practitioners to avoid misunderstandings. First of all, I wanted to hear their own description of the practices they carried out and the feelings they had in the processes. Moreover, I asked questions around broad themes, such as lead-

ership, management, communication, interaction and cooperation. I gathered facts and perceptions of the practices and activities they had had within the strategy process. The first interviews were already conducted in a narrative manner, appreciating the practitioners' realities and emic perceptions, letting them talk about their role in their own words and in an order relevant for them, without a structured interview agenda (Eriksson & Kovalainen 2008). However, during the research process, I could additionally increase the narrative logic of the interviews.

In the first phases of the interviewing I already found, against the findings of mainstream strategic management research, that the most pivotal elements constructing the practitioner's role seemed to be the multilevel interaction in order to obtain knowledge and to understand what the strategy meant for the practitioners' own work. Hence, I noticed that I needed to conduct further, deeper interviews and ask more about the practitioners' actions, practices and perceptions, from the perspective of the interaction. This decision was supported by the results of the Strada project (2000-2011) at Aalto University, also emphasising the significance of interaction in strategy implementation. At the beginning of interviewing, I gained clear support for my preliminary idea of the mid-level practitioners' role as a mediator, or potential mediator, of strategic information and a facilitator in strategy implementation. While my understanding increased regarding what was really happening in the strategy process, from the practitioner's angle, I could continue the research with a more phenomenological approach, asking about their experiences, values and attitudes.

I found *gathering and rewriting the mid-level practitioners' narratives* about their everyday experiences when implementing the strategy a relevant augmentation to the data, increasing the possibilities to identify new ways of seeing the practitioners' role and identity in the processes and to capture the complexity of the contexts and organisational actions (Chase 2011, 421; Eriksson & Kovalainen 2008, 169).

In the selection of practitioners and the theory building, I benefited from a possibility to link the research to my professional experience and from learning through a cooperative relationship with the practitioners. According to Chase (2011, 422-425), this kind of a close relationship increases the possibility to gain a broader understanding of the individuals and their stories in order to increase the quality of narrative inquiry. I could see the practitioners' stories develop from the bachelor level student to an experienced practitioner with an empowered role in the organisation's strategy process. The interviewed mid-level practitioners had a mainly similar kind of bachelor level background and some where even past students of mine, increasing my possibility to better understand and interpret their story. Still, the focus and the relationships were purely professional.

In the form of longitudinal action research, I managed to get into the culture of one of the studied organisations, in order to understand the activities and practices from the inside and to observe how people interacted with one another in their environment as Eriksson and Kovalainen describe (2008, 137-

138). The longitudinal contact with one case and its practitioners increased the possibilities for ethnographic understanding of the phenomenon.

In the following section I describe the *grounded theory phases of analysis* reflecting and reasoning on the data, coding and categorising. In grounded theory the codes are constructed during the whole research process in interaction with the data. Coding generates the bones of the analysis being a pivotal link between collecting data and developing an emergent theory to explain the data (Charmaz 2006, 45-47). Following Coffey and Atkinson (1996: 27-28), coding was used for data *simplification* and *reduction,* as well as for data *complication*, i.e. expanding, transforming and re-conceptualising data. Coding also helped to link fragments of raw data, aiding identification and generation of relevant *concepts* and *themes*.

The analysis was carried out in an iterative, abductive process involving simultaneous data collection and analysis, and including *initial* (or open), *axial*, *focused* (or selective) and *theoretical* (or advanced) coding (Birks & Mills 2011; Charmaz 2006). Like Coffey and Atkinson (1996, 30-37), I believe that rather than a mechanistic endeavour, coding is a *heuristic* and creative interaction and thinking with the data, aids the analytic generating of theories and frameworks.

4.2 Initial coding

During *initial coding* I attempted to stick closely to the data, allowing new ideas and thinking to emerge and remaining open to theoretical categories and possibilities to explanations, as Charmaz (2006, 47-48) recommends. My preliminary ideas of the phenomenon and the research problem came from my prior reading of the literature of traditional strategic management, leadership and organisational behaviour and psychology, as well as my experiences in practice. Hence, the first frameworks I had in my mind were mainly managerial, according to the mainstream literature. However, I also understood the working roles of practitioners at the same time, due to my work with them. As Coffey and Atkinson (1996, 31-32) propose, the coding started with frameworks from a researcher's prior reading and a preliminary research question, or with the participants' own categories, *in vivo* codes. The initial codes were provisional, comparative, and, most importantly, closely grounded in the data, rather than forcing the data into previously decided codes and categories, as Charmaz (2006, 48-49) suggests. Through playing with the data, trials and errors, I started to find more relevant codes and combinations.

In practice, the initial coding was dispersed to different angles according to the slightly different focus of the essays, aiming at descriptive, succinct codes telling 'who does what and how' in the strategy processes, as Myers (2009) suggests. Studying the phenomenon from different perspectives enabled me to achieve a rather broad understanding of the phenomenon in order to start the

analysis and theory building. In the following I compile the initial codes found in the essays (1.-5.)

In the *three first essays* I tried to figure out and understand the big picture of the employees' role and practices in strategy implementation, both at the organisational and individual level, in different kinds of organisations, in both domestic and international environments. The initial codes common to these essays were large categories of leadership, management, communication, interaction and cooperation. In the *first* essay I studied the essential conditions, activities and perceptions that employees expressed in strategic change at a more organisational level, also looking at the consequences, i.e. the outcome. The *second* essay coded and categorised factors that were experienced as related to the employee's engagement in the strategy process. In the *third* essay the initial coding extracted the mid-level practitioners' perceptions of their role and practices in strategy processes in an international environment. The *fourth* essay's initial coding concerned perceptions of all those involved in the strategic project that was to be implemented. The *fifth* essay dismantled the mid-level practitioners' practices and perceptions of their empowerment and activity in strategy processes. According to the data, the most successful activities in the implementation emerged as interaction and cooperation, rather than top-down hierarchical practices. The phase of initial coding is described in Figure 10.

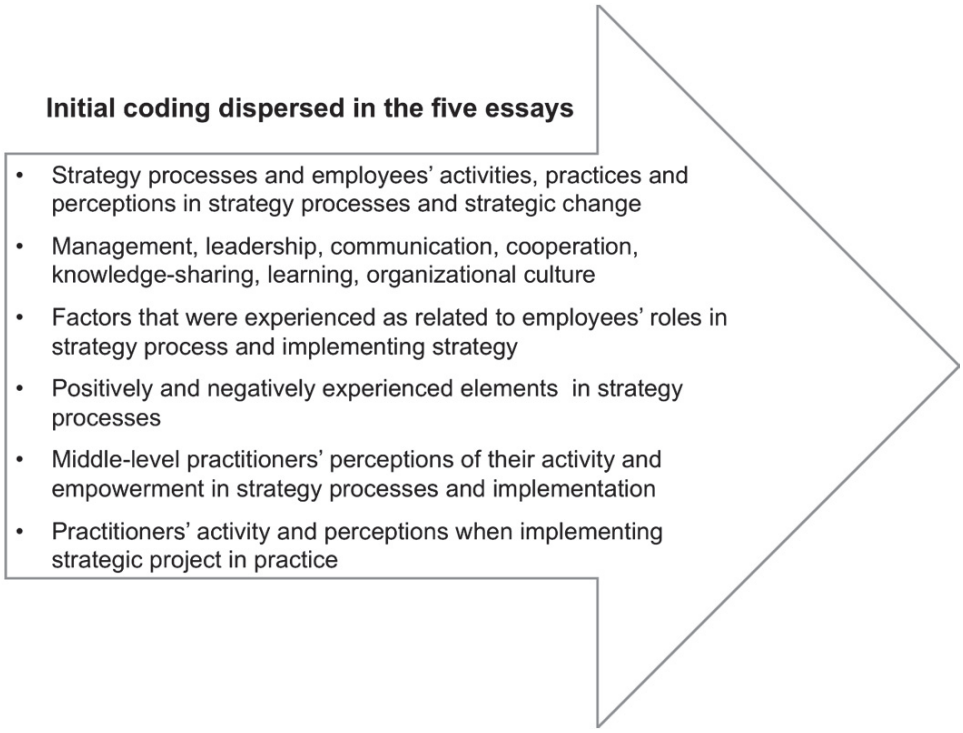

FIGURE 10 The phase of initial coding in the five essays

Through intensive interviewing, I got *raw data* that contained detailed descriptions of *what, when and how the practitioners did* during in the strategy processes. When talking about their role and practices, the practitioners described meetings, daily discussions, briefings, strategic events and workshops. These events are actually the 'in vivo' codes of communicating strategy. I compile strategy processes in two of the case organisations, as the practitioners expressed their main points and features (Table 4); and organisation cultures and employees' roles, as they described them within three organisations (Table 5). I have chosen the cases so that they would be rather typical in the data, but they still differ from each other in relevant ways. The descriptions are not comprehensive, rather they represent practitioners' perceptions of the most essential practices and characteristics of the strategy processes exercised within the organisations.

TABLE 4 Strategy processes in two chosen case organisations

Organisation 1 – A large company with big differences between the levels of practitioners
• The management team makes fundamental strategy choices on the basis of market analysis. • The strategy is formulated by the Extended Executive Board, together with middle managers. • The strategy is communicated to personnel through videos, intranet, management presentations, a road show, a staff journal • The grass-root level does not have access to all information channels and is rather dependent on the activities of their superiors. • Middle managers and superiors are supported in conveying the strategy, with its execution depending on the superior. • The results are followed at all levels of the organisation. • Top management and the developmental unit follow the implementation and inform personnel once a month of the results.
Organisation 11 – Middle-sized, strongly sales oriented company, part of a global company
• Top, key account and sales management, managers of supporting functions and unit managers update strategic guidelines together, with the help of background work, market and client analyses. • Marketing and development units have the responsibility for strategy planning, execution, monitoring and project management. • The actions needed are planned together in workshops with all of personnel. • The strategy is communicated in CEO presentations once a month and once a week by superiors and their teams, along with development appraisals. • Implementation is monitored with the help of indicators that are followed every week, including by top management, with sales results available online throughout the entire organisation. • Strategy information and documentation is available on the company's intranet.

TABLE 5 Employees' roles in three case organisations, according to practitioners' description.

Organisation 2 – Middle-sized, HQ of a European sales company, part of a global company

- The working environment is multicultural, comprising personnel from the company's global region units.
- Employees in the Finnish headquarters are mostly young.
- The communication culture is active and commitment is high.
- Face-to-face communication is appreciated, but electronic and virtual communication is frequently used in global communication, preferably via video call.
- All personnel have the possibility to take part in a strategy discussion before the strategy is agreed upon.
- Strategy discussions go on in units, departments, teams and individually.
- Knowledge-sharing is seen as especially important.
- Cross-functional cooperation is appreciated and encouraged.
- Even greater cooperation and interaction with own superiors and across unit boundaries is wanted.
- Discussion between country organisations is a challenge.

Organisation 8 – A large, traditional producer of consumer goods

- It is a respected company with a traditional organisation culture.
- Strategic guidelines come from the owners and the board of directors.
- In the parent company, employees take part in the discussion of strategy implementation.
- In the subsidiary, the culture is more authoritarian; middle managers make the operative plans together with top management, but other employees do not take part in the strategic discussion.
- Employee surveys indicate a high level of commitment and satisfaction.
- The strategy process is managed according to management books, such as Kaplan and Norton BSC, KPI, Must win battles, development appraisals, clear goals, bonuses and common celebration of success.
- Trainee programs are geared towards specific talents.

Organisation 11 – Middle-sized, strongly sales oriented company, part of a global company

- Employees are respected as practitioners who know their work best.
- Sales and sales supporting personnel are especially appreciated.
- Every employee takes part in strategic discussions in teams and workshops.
- Employees plan relevant actions in order to achieve the given goals.
- Employees have the possibility to develop their capabilities according to their interests.
- Every employee can make suggestions regarding projects.
- Employees can send questions to the CEO, which are to be answered in the information given by the CEO every month.
- Feedback can be given to the supervisor in their own team, the coordinator of the unit, in development appraisals and in electronic form.

The initial coding started the process of constructing an incisive framework to interpret the practitioners' actions and perceptions as components and properties of the studied phenomenon, as also Charmaz suggests (2006, 47-57). Reflecting on the raw data of practitioners' doings and their activities with the existing strategic management literature, it became clear that the traditional understanding of managerial centred actions did not cover, nor even come close to the point of view of the employee. Hence, I delved deeper into the practitioners' activities and started studying the literature of middle managers' roles in strategy work and their sensemaking processes more closely. I also found the S-as-P literature essential in giving tools to explain the activities in strategy processes.

4.3 Focused coding

Focused coding enables the selecting of directions for further analysis, making sense of the most significant earlier categories and comparing the data (Charmaz, 2006, 57-60). This phase was first dispersed in the essays with different perspectives of the phenomenon.

In the *first* essay, I focused and reflected on different types of change that people experience when implementing strategy. Applying Huy and Mintzberg (2003), the changes practitioners encounter in strategy implementation are dramatic, systematic and organic, all at once. Even though all types are needed, the most essential, according to them, is encouraging the organic, self-managed professional change for an active practitioner's role, in order to successfully cope with strategic change.

In the *second* essay the research proceeded from the more traditional and managerial angles to studying employees' perceptions of their strategic engagement through the lenses of the more recent S-as-P literature. Action, cooperation, encouragement, support and trust were found as 1., order factors, dialogue, interaction, knowledge sharing and sensemaking; as 2., order factors combining the other elements together to strategy implementation; while 3., order factors were seen to combine several elements, such as people and processes, knowledge, competence and creativity, as well as engagement and organisation culture.

In the *third essay*, I focused on the interaction and knowledge sharing points in the strategy implementation processes between mid-level practitioners in global organisations' country units, for example headquarters and subsidiaries in global companies. In this process the practitioner's informal but strategic practices that created trust and action started to emerge. The *knowledge flows* between active practitioners and their networks were continuous and multilevel. The ways of *sharing* and *creating* knowledge occurred simultaneously, at both formal and informal level. In fact, the informal level, behind and around the hierarchical structures of the organisations, emerged as essential for common understanding of the strategy in the global and local environment. For example management assistants were in direct contact with both the headquarters and the subunits of the organisation, even though the 'official' contact partners were the managers. Respectively, middle

managers in subsidiaries were in direct, daily contact with the practitioners in the headquarters.

In *essay 4*, the study focused on the implementation phases of the strategic change project in a real-life context and the practitioners' practices and perceptions during these phases. The action research revealed the obstacles and challenges of the process, especially during the phase of action taking, but also the critical turning points and moments where there is potential to develop the implementation practices more generally. These points concern in essay two found first and second order factors, i.e. cooperation, encouragement, support, trust and interaction. Moreover, the focusing revealed the elementary role of the managers' efforts in a successful implementation process.

During the narrative phase in *essay 5*, the focus was on understanding the individual practitioners' practices, activity and empowerment at the micro level. I focused on the *perceived modes of interaction*, *obtained strategic knowledge* and *understanding of the strategy*, as most of the practices and activities the practitioners described could be categorised under these new umbrella categories and they therefore seemed to be most critical for the practitioners' active role. Through placing in matrices I evaluated how the practitioners perceived they had got strategic knowledge and interacted in strategy processes, in order to compare the effect on their perceived role and empowerment. This focusing revealed the strategic nature of the mid-level practitioners' activities in supporting functions compared, for instance, with middle managers. These practitioners possessed high levels of knowledge of strategy and interacted this knowledge actively in the organisation across unit boundaries. In Table 6, using a narrative form I compile how the practitioners perceived that they had obtained knowledge of strategy in their organisations. For the table I chose different practitioner roles within both large and small organisations.

TABLE 6 How four practitioners perceived they obtained strategic knowledge

Organisation and practitioner	**How practitioners perceived obtaining strategic knowledge**
Org 1 Large company, part of a global organisation HR Coordinator	The strategic guidelines come from the HQ. Everybody is informed through many channels. The strategy is then processed in a team meeting and discussed with employee's superiors. Knowing the strategy is important, still it is challenging to understand what it means to the employee's own work. Most of the communication is one-way and a greater level of interaction is needed.
Org 3 Large global organisation Communications Specialist	The company strategy is formulated five years at a time in the global HQ and then communicated, cascade like throughout the organisation worldwide. Also, a change of command means a need of new learning for the organisation. The knowledge of new priorities comes in parts and demands pondering about what the new guidelines mean for the Finnish organisation and how they should be implemented. The company head also visits the Finnish organisation and explains the new priorities. The meaning of the strategy is understood within the communications unit in order to plan how the implementation can be supported.

(continues)

TABLE 6 (continues)

Org 12 Small, non-profit organisation Office manager	The most important source of strategic knowledge is an informal "tripartite" meeting with the office manager, administrations managers and the CEO. Communication is continuous to and from all parts of the organisation; board of directors, executive team and middle managers' forum as well as with the personnel in the field. The office manager can be described as a link between these parties.
Org 14 Small, municipal organisation Communications secretary	Strategic guidelines come from the strategy committee, formed by the elected trustees, national level organisation management and communications specialists. The knowledge is obtained mainly from an employee's superior, personnel meetings, intranet and minutes taken from the council meetings. The strategic guidelines are discussed locally with all personnel before the decisions are made. The municipal organisation is hierarchical, but open to discussion and appreciates the demands of the local circumstances.

To summarise, the practitioners perceived that their main source of strategic knowledge was their own superior and team. All CEO Executive Assistants obtained the strategic information on a daily basis from the CEO and regularly had meetings with the Executive team. They planned the agenda according to a yearly strategy clock, or together with the CEO. They documented the made decisions and often shared the knowledge within the different communication channels of the organisation. Thus, they had comprehensive strategic knowledge and they knew how the knowledge concerned the different units of the organisation. They all described that their role was being a 'link, filter, translator or contact surface' between management and personnel, supporting the management to communicate and implement the strategy as well as helping the personnel to understand the strategy. Hence, it can be argued they were more on the 'distributing than receiving side' of strategic knowledge.

Moreover, middle managers frequently shared strategic knowledge in their organisations, but the quality, coverage and frequency of the knowledge they obtained did not meet the level of the knowledge the CEO Executives received. Many of the interviewed middle managers only participated in the extended management team, or received information mainly about their own unit or organisation, while management assistants often attended every meeting that the executive team had and received all information, which was relevant for their practices concerning the entire organisation. Many of the middle managers felt they missed relevant information that would help in supporting their subordinates when implementing strategy.

Studying the practitioners' perceptions of the their *identity* in strategy work revealed that *constant learning* of new things was the most essential connecting factor in building their professional identity, gaining respect and trust, and thus having power to work more independently and be committed to the strategy processes. Senge (1990) similarly links together the processes of learning, commitment and personal mastery. The practitioners described their learning processes occurring at several levels: discussing with their superiors, pon-

dering by themselves, in their team, but also in cooperation with the other units of the organisation. Open dialogue, cross-functional and cross-cultural meetings were mentioned as being essential for learning and cooperation.

The narrative labouring of mid-level practitioners' roles enabled analysing, describing and constructing the strategically active and successful practitioner's role and identity when implementing the strategy, as Eriksson and Kovalainen (2008, 218) also suggest. The mid-level practitioners chosen for narrative analysis all had a clear image of their role and identity as empowered professionals, occupying their central position within the strategy process of the organisation. In the previous phases of the research I also encountered less self-confident mid-level practitioners, tasked with facilitating the strategy process but not really being aware of the strategic character of the practices they carried out, and not seeing their potential to work more independently or proactively in the processes. My interpretation of the differences in these practitioners' perceptions was that they were only partly due to personal differences, more relevant seemed to be the *social realities* within the organisations and how the practitioners were treated and respected. Moreover, the practitioners perceived that essential for their empowerment was not only knowing the strategy, but also having good cooperation relationships and knowing the organisation. For middle managers' identity, most important seemed to be their mediating and supporting role in strategy implementation. The HR and communications officers experienced that their professional identity grew from understanding the strategy and of helping employees understand and implement it in a global environment.

In Table 7, I compile the practitioners' descriptions of their strategic identities.

TABLE 7 Practitioners' strategic identities described by themselves

Perceptions of strategic identity	**Practitioner and Org**
A practical implementer, with strong HR identity	HR Coordinator, Org 1
Facilitating, organising, communicating and translating. Having a key position, but not being personally involved.	CEO Executive Assistant, Org 2
Company strategy mediator, with professional pride. My role is supporting the strategy work, conveying the company strategy and communicating it within the organisation.	Communications Specialist, Org 3
Supporting and encouraging	Middle Manager, Org 4
Implementing our values, strategy is the backbone of the work.	HR manager, Org 5
My role is being the 'communications link' between management and personnel, I try to explain difficult strategic issues to people because everybody needs to be able to implement the strategy in practice and do a good job. I work independently because I want us to succeed.	Executive Assistant of regional plant, Org 6
Interpreter in between, helping everywhere I can. It is important to have the big picture, know the entire organisation and respect everyone.	Management Assistant, Org 7

(continues)

TABLE 7 (continues)

Proactive facilitator, 'shepherd', scheduler, taking care that things keep going and tasks get done. Planning actions proactively, communicating and 'filtering' information between top, middle management, and personnel. Having a delicate and confidential role, supporting and representing the CEO and executive team, but being part of the personnel, still rather lonely without a team.	Management Assistant, Org 8
Link between management and personnel. Understanding the organisation's business, having the big picture.	Management Assistant, Org 9
Dual role, Assistant for Executive team, superior of Assistant team. Our role is managing the schedules, organising workshops and meetings, on-time. It is about knowing the business and stakeholders and coordinating work. Taking care of the informal communication, documenting and sharing knowledge.	Head of Support Office, Org 10
Helping and supporting everyone. It is very much hands on, rolling up the sleeves, but also developing these supporting functions. It is about being more effective and serving our people in the field, helping them to focus on their demanding work.	Office Manager, Org 12
Global doer and communicator, where you work does not matter. People need to be encouraged to develop their know-how, rotate tasks and work cross-culturally and globally.	HR Officer, Org 13
The factotum of the organisation. Strategy is about serving and encountering clients, seeing that everybody's role is important from cleaner, to doorman, to manager. It is about seeing people's strengths, personalities, skills and know-how.	Communications Secretary, Org 14

4.4 Axial coding

The *axial coding* overlaps the idea of focused coding, relating the categories to subcategories, sorting, synthetising and specifying the properties and dimensions of the categories. While initial coding separates the data into pieces and distinct codes, axial coding brings the pieces back together in a coherent whole. (Birks & Mills 2011; Charmaz 2006, 60-63). During this phase, I started to search for the whole story, with interlinking relationships between the categories of the perceptions of activity, interaction, strategic knowledge and empowerment to form the successful implementation roles of the practitioners. Reassembling of the data helped to clarify and formulate the concepts and their linkages. These organising schemes included conditions, contexts and roles where employees' strategic activities were enabled, and saw the combinations of actions and interactions of the practitioners in successful strategy implementations. I first examine the practitioners' roles through their practices and activities in strategy processes and then, in the form of narratives, the practitioners' roles,

also including the aspects of social and organisational power and identity that the practitioners experienced.

4.4.1 Practitioner's strategic practices

The main impression from the data portrays strategic practices forming of interaction, such as daily cooperation, meetings, discussions and workshops. These, according to practice theorists, are a busy surface of events (Vaara & Whittington 2012). Focusing and digging deeper in this interaction and looking through larger, 'axial' lenses at *what practices the mid-level practitioner's actually do during these encounters* in order to implement the strategy, shows that they:

1) *Communicate* the strategy verbally and in writing, i.e. translate, adapt and mediate the message for different business purposes, groups of employees, for different communication channels, from face-to-face to digital. They communicate the strategy within their network, from the middle of the organisation outwards, in all directions: 'up' to management, HQ and owners; laterally and cross-functionally with colleagues; 'down' to subordinates; and 'out' to customers and other stakeholders. Moreover, on daily basis, they answer questions concerning the meaning of the strategy; they encourage and support understanding and application of the strategy. The active mid-level practitioners comprehensively carry out these kinds of communication practices, but the middle managers' practices focus more on the daily supporting, while assistants do more pre and post writing practices.
2) *Coordinate* the organisation's efforts, according to the strategic guidelines, helping the local teams adapt to the strategy. They plan, schedule, execute and monitor cooperation that contributes to adapting and implementing the strategy. Additionally, they coordinate subunits' efforts and local understanding of markets, according to the global strategy.
3) *Integrate* differing viewpoints towards common understanding of goals and means. Moreover, they help integrating cross-functional and cultural efforts towards common goals.
4) *Organise* and carry out meetings, workshops, strategic info events and performance appraisals, where the strategy is discussed, common understanding of strategy is built and implementation established at the local level.
5) *Facilitate* practices in the strategy process, make practical arrangements, 'help' in all ways as part of the previously mentioned practices (1.-4.)

An empowered management assistant could do these practices at different levels of their own organisation, the subunits and towards the headquarters. A middle manager that has strategic knowledge and support from top management could encourage and facilitate strategy implementation as a coach in their own organisation. The detailed describing of the practices makes visible the

mid-level practitioners' multilevel communicating, coordinating and integrating practices across organisation boundaries, often going unnoticed or taken for granted. Furthermore, Sull et al. (2015) state that the greatest challenge of executing strategy is the failure to coordinate across functions and units of the organisation. These practitioners act as *change agents* within the organisations, in Kotter's terms (2012), navigating between hierarchies, old methods and managerial processes. If these irreplaceable practices are not recognised, the practitioners' value can also go unnoticed. Cutting back in these kinds of supporting, cost-effective, but invisible functions, can become expensive to companies.

Moreover, the practitioners do valuable activities that are not easily described as concrete 'practices'. They not only communicate the strategy and coordinate the work, but build a successful organisation culture. When middle managers encourage and support employees to implement the strategy, they enable positive working experiences. Similarly, when assistants help employees to understand what the strategy means for their work, they establish trust and common understanding in the working community. When communications specialists tell stories of how organisation members implement the strategy successfully, they build the feeling of togetherness and community in the organisation, at its best, on a global level. The communications specialists are, in Kotter's (2007) terms, *institutionalising* change in the corporate culture, showing people how the new ways of work have helped improve performance. According to Nonaka and Takeuchi's knowledge spiral, these practices are part of *internalisation,* meaning the transformation of knowledge from explicit to tacit (Dalkir 2011, 64-71; Mintzberg et al. 2009, 225-227), i.e. stories are transformed to feelings of togetherness. Hence, I believe, like Pitelis (2009), that organisational infrastructure can create value through the unique personality and character of the organisation and its people, and thus, innovatively acquire and upgrade knowledge and increase efficiency and productivity when implementing strategy. According to social practice theorists, these practices stretch across time and space to form *systems*, *fields* or *apparatuses* where social action is embedded in organisations (Vaara and Whittington 2012).

In Figure 11, I describe the character of management assistants' practices in the strategy process according to what is, for them, the most relevant angles of concept interaction. The tasks are examined from the point of views of their *awareness of the strategy* and the *interactivity* during the task, i.e. if the task required working together with others, or could be performed individually. The most engaging tasks included both, for example, communicating the strategy and making sense of it to co-worker employees, while the least aware contributions were making practical arrangements for strategic events, meetings and workshops without having knowledge of the strategy or having any role in the event. Most of the potential goes wasted when the practitioner does not understand the strategic meaning of the practices and perform them in isolation. Comparing these practices with middle managers' doings, both had communicating, sensemaking and supporting practices, but the middle managers' cooperation boundaries were narrower concerning, mainly their own unit — while

assistants, HR and communications specialists communicated more across unit boundaries. Middle managers' awareness of the strategic nature of their tasks was higher than the assistants. The assistants' 'antisocial' tasks concerned knowledge searching, formulating, and translating, while middle managers were involved in monitoring the results and performance. On the basis that strategy implementation is much of a social and cooperative endeavour, the focus of the tasks could be more interactive.

FIGURE 11 Management assistant's practices in strategy process from the angles of the perceived level of awareness of the strategy and interactivity of the task.

In the final phase of axial coding, I merged the fragmented but essential elements of the mid-level practitioner's role, identity, practices and perceptions to coherent stories in the practitioner's real-life context. With these stories I wanted to show the practitioners' roles from the point of view of the research question, i.e. to construct the mid-level practitioner's successful role in strategy implementation. I first re-wrote mini-narratives of mid-level practitioners' roles in strategy implementation in an international setting, in essay 3. In this final report I write 'whole' stories of five mid-level practitioners, chosen according to how the practitioners 'scored' in the categories of the previous phases of the research, i.e. for example, how much power they had in the strategy processes and how actively they participated in strategic activities and interaction. Furthermore, the selection is based on the researchers' and practitioners' subjective perceptions of the successfulness of their role.

The roles are presented tightly following their expressed perceptions of what they did, felt and thought, when they implemented the organisation's

strategy. The practitioners were all Finnish, but they have been renamed with their 'matched' English names. An interesting notion is that all of those chosen unintentionally emerged to be female practitioners in supporting functions. This finding confirmed my will to make their story visible and give voice to their efforts that often go unnoticed. Vaara and Whittington (2012) also recommend revealing these kinds of taken-for-granted phenomena that can prove to have wider societal relevance. I re-wrote the narratives from the documented interviews and checked the stories through with the practitioners. Without exception, the practitioners felt that I had successfully captured their point of view and perceptions of their role and tasks. The following stories are presented in the next subchapter.

1. Sheila: 'The strategic storyteller in a global environment', Org 3
2. Susy: 'The multitasking communicator', Org 7
3. Shirley: 'The coordinating local hero', Org 6
4. Anna: 'The administrator and contact for the whole organisation', Org 12
5. Sue: 'The factotum of the municipal organisation', Org 14

The grounded theory process continues with theoretical coding in chapter 4.5, where I bring up the stories back to the organisational level, in order to develop the knowledge through explaining, relating, synthesising, idealising and generalising.

4.4.2 Mid-level practitioners' narratives

1. Sheila: 'The strategic storyteller in a global environment', Org 3

Sheila works as a Communications Specialist, in a Finnish subsidiary of a global company. The Communications unit, with 12 communications experts, occupies a supporting function for the Finnish operations of the company. The unit director reports to the country manager, who reports further to the Central European headquarters. Sheila perceives her role is a service task, based on the needs of internal customers and on mediating the company's strategy.

Sheila started working in the organisation nearly 20 years ago, as a management assistant. The assistant work included largely internal communication, even though the tasks were limited more to her own unit. Working as an assistant was a good start for her career, as she learned the inner-workings of the organisation. The work environment in her present position comprises the whole in-country organisation, and also requires managing larger entities, reaching out across unit and country borders. In her role as a communications specialist, Sheila is also part of the global organisation's communication in the business unit. The tasks demand the mastering of larger entities and cooperation in the multilevel global organisation, as well as knowledge of the business and its products.

Sheila believes that her identity has developed through studying. In the past she worked as a journalist for ten years, but perceived the work as too extensive when her children were still young. She wanted a more regular job and sought an education as a secretary. Even though secretary work was convenient at that stage in life, she felt that when she was a journalist, her soul and spirit lay in appreciating the independence and autonomy of work. Through taking study leave and completing her master studies, she could advance to the role of communications specialist. So, she feels that education has had a crucial role to play in her career.

Company strategy is formulated in five-year periods. According to Sheila, the country units do not often attend this formulation. The new strategy usually reflects a new director's priorities and way of thinking. When the head of the company changed about a year ago, the strategy received a new direction, which is still interpreted in practice. Sheila says that change of command means need for new learning within the organisation. The knowledge of new priorities comes piece by piece, which requires pondering on what the new guidelines really mean for the Finnish organisation and how they should be implemented. The company head has also visited the Finnish organisation and explained these new priorities. It is important to learn and understand the new way of thinking, so that the business can be developed and decisions at country level can be made in the possible best way and in accordance with the new guidelines. Knowledge of strategy plays a central part in Sheila's working role. She searches for information and formulates it in order to help the implementation of the strategy. Knowledge-sharing in her work means supporting the strategy implementation. Sheila experiences that the awareness of strategy is behind all actions and implementing the strategy is the reason for her work.

The strategy is communicated like a top-down cascade, across the whole organisation. Top management presents the strategy to all units and stakeholders. The unit directors then convey the strategy forward in their organisation down to the grassroots. The communications unit supports this process. Based on the company's strategy clock, the communications director and the chief of internal communications schedule the unit's own strategy clock, with core monthly issues guiding the communication. The strategy clock strongly formulates the daily processes. The strategy and brand also formulate the visual look, colour and images of the communication in detail.

In practice, Sheila has already checked what the priorities are for the next period a month before, from this she finds out if the other business units have had any events, news or success stories to tell of, and how these activities could be linked to the strategy. The communication in practice means articles, videos and newsletters. Videos and TV are an intensively growing form of communication. Interactive social media channels, such as Yammer, and the Intranet take over, but also face-to-face channels are important, such as Communities of Practice (CoPs) and training, depending on the unit. The communications unit supports the different units' strategy communication according to their needs,

through offering consultation, for example. The communications unit's central task is to link all communication to strategy.

Sheila perceives strongly that her role is supporting the strategy work, conveying the company's strategy and communicating it throughout the organisation. She says that mediating the strategy using communicative means is her main task and reason of work. Together with the communications unit, she influences people's thinking and understanding of the strategy. The role of the communications unit is important when communicating the strategy, even though the strategy is mainly communicated as a part of daily cooperation in the business units.

The primary skills needed in strategy work, according to Sheila, are knowledge of the organisation, its business, its products and its objectives, as well as understanding the ways of thinking and working. Sheila thinks that it is essential to continuously develop an understanding of the substance of the organisation. Moreover, it is important to have good communication and writing skills and develop these as well. Today, especially, managing multichannel communication is pivotal.

Sheila perceives that understanding the meaning of the strategy in daily life, knowing the organisation and mastering the technical tools, make the work fun and easy. She thinks that it is fun to learn about new products, how they are used and what the customers think of them. In her work she has the possibility to continuously learn and develop her skills. She has a level of professional pride and her know-how is respected, making it possible to work independently.

2. Susy: 'The multitasking communicator', Org 7

Susy works as a management assistant with the executive team and the board of directors, at the Finnish subsidiary of a large company in the financial sector. The company is headquartered in Northern-Europe and has ca. 20,000 employees. The subsidiary in Finland employs ca. 2,000 persons and has ca. 20,000 employees globally. Susy's business customer services unit is responsible for strategy implementation actions with 300 hundred practitioners in Finland. The discussion is active between HQ and their subsidiary and the HQ managers also regularly visit the subsidiary and take part in the local discussions.

In addition to the traditional management assistant tasks of organising and facilitating the work of the executive team and projects, Susy's role also includes HR and ICT tasks. She schedules, organises, prepares and facilitates meetings and events within the organisation, between the offices, for the executive team, board of directors and other personnel. Daily tasks mean being the 'call centre', 'travel manager' and 'help desk'. As CEO assistant, time management is essential and the managers' calendars need to be up-to-date. The HR tasks include planning and organising the training for personnel, for example.

Strategy comes from the Northern-European parent company. Officially, all subunits follow the strategy but, in practice, the strategy can be completed

locally. The implementation starts with a kick-off and presentation of the strategy in the subsidiary. The local applicability of the strategy is actively discussed and assessed in the executive team and in workshops with all personnel in the area units. Susy organises and participates in the strategy workshops for both the executive team and the personnel. She documents, compiles and translates the development ideas to the HQ and after getting feedback from there, back to the unit offices. The middle managers in the unit offices have a big role in the implementation of strategy throughout the whole country. It is important that the strategy can be discussed even in the smallest units and it is understood in the unit-specific manner. Everybody needs to understand the meaning of the strategy in relation to one's own work. Susy feels that she is an interpreter between these groups, translating and explaining the meaning of the strategy.

In addition to organising the strategy workshops, Susy has several tasks in strategy work. She searches for information, calculates and analyses organisational performance indicators, plans presentations and reports for the management and the personnel. She formulates and translates strategic information to the HQ, both on the intranet and the executive team's team site. While the communications unit is responsible for external strategy information, Susy takes care of the internal and informal information in the organisation and between the headquarters and the area units. Still, the cooperation with the communications unit is frequent.

Susy thinks of the organisation culture as dialogical, open and cooperative. The round table in the executive team's meeting room is already a good sign of this. The cooperation levels are also good between the assistants within the organisation, in both formal and informal meetings.

Susy's motto is "I help everywhere I can". Her attitude is characterised with a will to learn and proactively take care of all tasks. She thinks it is important to have 'the big picture' and manage the networks in the organisation, from cleaners and doormen to the directors. Susy thinks humility is important because everybody's work in the organisation is important.

3. Shirley: 'The coordinating local hero', Org 6

Shirley works as the CEO's Executive Assistant at a Finnish industrial plant, employing 160 people. The plant is part of a headquarters with 900 employees, which is also part of a large industry company, headquartered in Finland with around 10,000 employees. Shirley is a member and secretary of the board of directors. She keeps the minutes and produces information for the executive team's decision-making. Her tasks include communications of the unit and cooperation with the communications at the headquarters, which she thinks is good and seamless. Together with the plant director, she plans a yearly schedule for management and strategy implementation, according to the themes of the strategy prescribed by the headquarters. The most important tasks in the strategy work are the mission, vision and values, which are the basis for the action plans, focus areas and key objectives at the plant. These are communicat-

ed to the personnel and stakeholders using several channels. Personal targets are planned according to the yearly objectives of the plant and they are discussed and monitored twice a year in performance appraisals, which are an important part of the processes. These discussions have been mutually appreciated and experienced as confidential. Half of the plant personnel participate in planning of the yearly action plans. Shirley sends invitations and plans and organises strategic events for management, personnel and stakeholders.

Shirley participates in strategy work in many ways supporting the management. She thinks good management is important, but a management assistant needs to work independently and committed for the company's success. Management work, internal communication and strategy implementation are closely connected. Shirley is a communication link between management and personnel, mediating the strategy and goals to the personnel and explaining the difficult issues to people, because everybody should be able to work according to the strategy. She is also a link between personnel to management conveying ideas upwards.

Shirley thinks the communication climate in the organisation is confidential and everybody's opinion matters. Also, managers walk the talk. The managers' road show from the headquarters to the plant floor twice a year is important for the personnel. The most important communication channels that Shirley uses are the website, intranet for personnel and extranet for stakeholders, information TV, meetings, customer and personnel magazines and events. The weekly news on the intranet is eagerly awaited and much-read among personnel. Shirley also participates every morning in the production meeting, where she informs those present about important issues. All feedback from personnel and the field is documented and questions answered.

Shirley's network is wide, as an assistant she communicates most in internal matters, but is also a communicator in external issues. She plans the contents and schedules and organises the strategic information meetings for personnel. Shirley is the contact link and coordinator between the organisation and the stakeholders, compiling, analysing and managing stakeholder information and activities of the responsible persons. She plans and organises information, visits, company presentations and events for the stakeholders

Shirley thinks the strategy work is successful because strategic issues are worked on regularly during the year, information and communication is good and the meeting and working practices are systematic and well planned. She schedules all important management events, the yearly and monthly action plans, which she thinks are really useful in helping daily work. For the strategy implementation she schedules and instructs the responsible persons, according to the decisions made.

Shirley thinks her role is important as a collaborator with the plant director. She has long experience of continuous learning behind her and welcomes new challenges.

4. Anna: 'The administrator and contact for the whole organisation', Org 12

The non-profit organisation works for a global mission. It was founded 15 years ago and today employs about 70 experts, from more than 20 nationalities working all over the world. According to the chairman, people are behind the success of the organisation, the staff need to be taken care of and everyone from board members to trainees must be treated with dignity, respect and openness. The highest decision-making organ is the 'General Meeting', which convenes twice a year. The board of directors is responsible for the long-term strategy. The executive leadership team leads the implementation of the strategy. An informal program development forum contributes to planning and developing the program and internal processes. Globally accessible HR, ICT and other supporting functions, i.e. the office management, is essential in this kind of an organisation where people work on demanding tasks all over the world. Accordingly, Anna experiences that her most important task is to support the people implementing the mission of the organisation in challenging circumstances within the field.

Anna's role has advanced during the five years she has been working in the organisation as Office Manager. She has seen the development of the organisation from less than twenty workers to today. When she started she was the only one taking care of administration. She has been involved in multiple tasks and also studied further on her own. Anna thinks the development of the organisation can be compared with a start-up because all the processes needed to be built from the very beginning; administration, infrastructure, procurement, field offices, functions, ICT. Today there are eight persons in the supporting team, taking care of finance and administration. Anna's job is more HR and ICT oriented. Her HR tasks include recruiting, induction of all new personnel in the organisation's processes and internal training, concerning multiple themes, applying the procurement law or ICT security, for example. Additionally, she works as an ICT manager, planning and developing the ICT architecture. Even though she now has backup in the supporting functions, she rolls up her sleeves whenever needed. Everyone in the team helps one another.

Anna is a secretary on the board of directors and plans the agenda for the board meetings, in cooperation with the executive director and the director of finance and administration, in informal 'tripartite meetings'. In addition, proposals come from the middle managers' discussion forum, where the themes, projects and internal processes are discussed. Anna's role is much characterised by close collaboration with the director for finance and administration, who is her most essential link to the executive team. Anna plans work together with her; at a strategic level that means the yearly action plan on how to implement the strategy with the personnel. Anna executes decisions that the management does and also makes proposals to the management about administrative projects. Anna is a multilevel communicator in the organisation as she has contact to all personnel globally, through her HR role and cooperates with the commu-

nication's unit and all the decision-making teams, getting all the relevant strategic knowledge needed. In addition, she is involved in interaction with external partners and stakeholders, governmental bodies, such as ministries and the Office of the President of Finland, for example.

Anna's working identity builds on the organisation's mission. She thinks the most important thing is supporting the activities of the organisation and the people who work for the organisation's mission. It is mainly about planning and developing internal supporting functions, processes, training, ICT and security, but also helping personnel in their demanding work. Anna thinks multiculturalism is a wonderful asset, but it also creates challenges that you need to be aware of. Anna feels that the feedback she gets from the people in the field when she has been able to help them, as the most rewarding. She thinks it is a privilege to know all the personnel in the organisation and see the big picture of supporting these people's challenging work.

5. Sue: 'The factotum of the municipal organisation', Org 14

During the past 13 years, Sue says that she has been the 'factotum' in the organisation, working with all kinds of tasks, from copying to advanced strategic and administrative organising tasks, managing the infrastructure and communicating in all directions, as an assistant and superior in the office team. The risk for an all-round assistant is taking on too many tasks because you have ideas and get easily interested.

Sue perceives her role as mainly gathering and sharing information, working on ideas to develop operations, encouraging discussion, preparing proposals and supporting the formulation of strategic contents. Her tasks include all kinds of organising, from scheduling, preparing materials and sending invitations to strategic meetings, to making coffee and checking the technical apparatus and facilities before the meeting starts. She perceives that strategy work is easy, because it is simply every day work that allows the running and development of the business of the organisation. She thinks that assistants' abilities lie, potentially in project management, marketing, ICT, communications, for example, and that understanding of human resources should be utilised better.

Sue feels that her identity has developed through both job rotation and constantly studying and learning new things. She thinks studying increases professional confidence and reassurance of having the skills needed and mastering the tasks. It is about decision-making every day, getting along with people and having team skills. She thinks that when you know the work and the rules, you can also question old routines, suggest new ways of working and add new knowledge. The role takes its shape from her personality and has developed towards a creative, open-minded and contact taking type.

Within the municipal organisation, the strategy process starts with guidelines, which come from the strategy committee — formed by the elected trustees, national level organisation management and communications specialists. The guidelines are then discussed locally with all personnel, before the deci-

sions are made. The municipal organisation is rather bureaucratic, but still open to discussion and the whole strategy process is interactive. Locally, it is important that the guidelines follow the population in the area. The values are discussed in small groups, brainstormed, formulated and finally the best suggestions are voted on. After the decisions are sealed in the council, the strategy is formulated to the website and informed through local events. The personnel are also informed of the strategy and it is discussed in subsequent meetings, discussion sessions and performance appraisals. Strategic issues are also discussed with people in the community; where they are asked what kinds of activities they would need and want. Strategy work is largely interactive.

Strategy for Sue means 'searching, producing and sharing knowledge, as well as ideas, hope for change, capabilities, decisions'. She feels that strategy is something positive, like 'digging for treasure; searching, finding, becoming aware and also using all your senses, listening, looking, talking and scenting.' By scenting she means 'having your antennae (pointing in) all directions', like an assistant or middle manager, between manager and employees, being loyal towards the superior and emphatic towards colleagues. It means 'aware attendance'. Strategy is about serving and encountering clients, and in that sense everybody's role is important, from cleaner, to doorman, to manager. Sue's motto is that all work is significant, from factotum to experienced professional. Strategic skills mean having marketing spirit, understanding the business and human resources and having communicating skills. It is also about envisioning and seeing people's strengths, personality, skills and know-how.

Sue emphasises the importance of knowledge in everybody's tasks and knowing where you are heading. According to SH, the superior's skills are important in strategy work, to be as good as one's words, to realise the promises and go towards the vision. It is like navigating using tacit knowledge. People may think the new strategy is a threat, but still, the superior should get everybody involved, understand what people think is important, encourage them to think about one's own work and to find the actions needed, it is like coaching. The assistant's role in this is supporting and helping the superior to get the strategy implemented.

Sue finds the feeling of influencing and developing your own work, thereby participating in the whole organisation's future, as the most inspiring element of strategy work. Most difficult is applying the strategy in practice and measuring its implementation. The most negative part is when the staff needs to be cut down, when some tasks are not needed anymore.

When pondering on how strategy work could be developed further, Sue mentions brainstorming in the executive team and also with assistants from all local organisations. She thinks assistants have such a vantage point towards superiors and together they could solve problems in advance.

Taking the narratives together, the successful mid-level practitioners' roles studied, looking not solely at the practitioners' practices but also their roles in the organisational community, reveals these practitioners having significant social and

strategic roles that clearly constitute as *extra-role behaviours* (ERB), going beyond the role descriptions in order to benefit the organisation (Van Dyne et al., 1995). They are an example of *Organisational Citizenship Behaviour* (OCB) that is not directly or explicitly recognised by a formal reward system, but promotes the effective functioning of the organisations (Organ, 1988; 1998). More specifically, their activities can be defined as *helping behaviour* (Podsakoff et al., 2000), taking supporting functions seriously and helping members and stakeholders of the organisational community with all their might and knowledge. These practitioners acted like 'change agents' communicating the strategy and facilitating the cooperation in the organisational networks (Kotter, 2012). The discovered roles can concurrently be compared with Mantere's (2003) employee champions in the strategy process, actively trying to influence issues she regards strategic and, in particular, 'empowered champions', playing the role of 'facilitators', helping strategy processes and creating strategic success (Mantere, 2003, 117; 2005). I believe the here presented mid-level practitioners also had key positions in the success of their organisations' strategy implementation.

In the next chapters I continue to reflect on the meaning of these practitioners' capabilities, practices and knowledge processes, in order to explain a successful practitioner's role and identity and strategy processes at a more abstract theoretical level.

4.5 Theoretical coding

During the *theoretical coding* phase, I attempted to specify the relationships and integrate the categories to an analytic, comprehensible and coherent context, conditions and story, according to Charmaz' (2006) suggestions. I tried to describe the active mid-level practitioner's roles as they experienced them through their tasks, activities and interaction in the strategy process, as well as the elements they perceived as essential in these networks when encountering strategic change. The coding process helped viewing the data in a focused way, discovering significant components and linkages and gaining a deeper understanding of the practitioners' empirical world.

As Charmaz (2006, 63-71) points out, it is essential to be aware of the *subjective* nature of the coding, categorising and reasoning processes, not forcing the data back to the old, managerial oriented boxes and frameworks. Coffey and Atkinson (1996, 45-52) argue that moving from coding to interpretation demands moving from the fragmented details back to the 'whole' picture; the data need to be displayed, explored, played with, resorted, renamed and transformed to meaningful data. Moreover, they warn that when coding, it is important to be aware that codes and categories are not the whole story and it is important not to lose the original account and the big picture.

Narrative inquiry, as understood by Chase (2011, 421, 430) is: 'meaning making through the shaping or ordering of experience', which offers a way of

understanding and connecting people's actions and events over time as a meaningful whole. In particular, during the process of rewriting the mid-level practitioners' narratives their role began to take shape in the context of strategy processes in a relevant way both for practice and theory.

Interaction emerged as the *core category*, interpreting the practitioners' perceptions and was profiled as the umbrella category to the related concepts, such as knowledge-sharing, dialogue or cooperation. However, this core category was recognised as not having an ability to totally explain the activity and agency of the employees' in the processes, related concepts and categories were additionally needed.

Before I go to the next phase of constructing my story, which emerges from the previously categorised elements, I reflect on the possibilities of applying existing theories in order to explain the studied phenomenon of the mid-level practitioner's successful role in strategy implementation.

4.6 Reflecting the results towards extant theories

The emerging theory gets its shape from studying both the data and its codes and categories, but also reflecting on these with the *extant theories* that previous research has produced. I first reflect on the findings with the more traditional strategic management views, then, with activity based strategic management theories, and finally, with the most closely related and relevant social and organisational theories. However, applying the pragmatic S-as-P approach, more important than uncovering what theory is adopted, is finding out what problem is explained, as Jarzabkowski et al. (2007) state.

4.6.1 The resource-based view

The theory building on the mid-level practitioner's role in successful strategy implementation can be constituted on the foundation of the *Resource-based view of the firm* (RBV), underlining capabilities that create resources (Clegg et al. 2011, 85; Hoskisson et al., 1999). Most relevant for my research is that the RBV offers means to understand the *potential of human agency* to create valuable resources. SHRM scholars have found strong support for the critical role of human resources in organisational viability and performance and propose more interaction between the fields (Boxall & Purcell 2005; Crook et al. 2011; Wright et al. 2001). Similarly, I believe that both views can be valuable in increasing our understanding of the potential of human resources within organisations.

A foremost shortcoming of the RBV, from the point of view of my findings, is that it has mainly focused on the *core competencies* of the organisation, introduced by Prahalad and Hamel (1990), which neglected or even depreciated the capabilities of the supporting personnel. However, using unique managerial core competences to formulate the perfect strategy is useless if those strategies

cannot be implemented. I argue that the supporting personnel's role can be essential in the implementation of strategy in organisations.

The mid-level practitioners' narratives in this research actually tell us about *critical strategic capabilities* in functions that are generally considered as supporting, and as less important. Supporting capabilities have not been treated as unique resources, but according to my findings, active, mid-level practitioners have essential skills that they can use to develop strategy processes, such as communicating the strategy, coordinating and integrating strategic knowledge, as well as organising and facilitating the strategy processes. With these skills and through these practices they influence and develop the common understanding of strategy, cross-functional and cultural cooperation, organisation culture and a positive working atmosphere, which according to Sull et al. (2015) have all been considered as the main challenges of strategy implementation. In this research, mid-level practitioners were recognised to have both capabilities and unrevealed potential that could be better used to develop strategy implementation and, therefore, boost the results of their organisations. The value, rarity, non-imitability and non-substitutability of the capabilities, i.e. Barney's (1991) VRIN model, are *created through cooperation between people*, or VRIO, where 'O' stands for 'organisation', i.e. the resources need to be organised in order to exploit them to their full potential (Barney 1995). These often underestimated tacit and socially constructed practices and resources need to be made visible, to see how it is possible to organise organisations' efforts in a sustainably successful way, to create competitive advantage (Barney 1991; Grant 1991).

As practitioners' cooperative practices and processes are highly dynamic, the main limitation of the RBV, from the point of view of current research, is its structural, rather than an *active* approach, focusing on maintaining capabilities, and thus missing the dynamic change perspectives of *how* capabilities arise and develop, how organisations can integrate and build competences, and how competences and activities are creatively combined and learned, as Clegg et al. (2011, 95-98), Helfat and Peteraf (2003), Nonaka and Toyama (2003), Regnér (2008) and Teece et al. (1997) also state.

The *Dynamic RBV view* offers a more comprehensive approach, concerned with organisational adaption, learning and change processes over time (Clegg et al. 2011, 99; Helfat & Peteraf 2003; Teece et al. 1997) and applying of people's capabilities in order to enhance firm performance (Regnér 2008). As Jarzabkowski (2004) and Regnér (2008) recommend, in this research I have examined the implementation activities in order to understand what people *do*, rather than what capabilities they *have,* however, believing these doings are the very essence of highly inimitable resources. Such strategic practices include mediating the strategic knowledge, enhancing the common understanding of strategy and the adaption of strategic change and learning, and thus also integrating, coordinating and creating knowledge within the organisation. These kinds of integrative skills can produce a competitive advantage through organisational alignment, as Powell (1992) suggests.

The value of mid-level practitioners' capabilities in strategy processes and implementation can go unnoticed in research and practice, if the focus is solely on the direct economical affects. This concern is shared by Helfat and Peteraf (2003), who state that dynamic capabilities do not necessarily affect the output directly, but instead, contribute to the output indirectly though operational capabilities. This research clearly implies that mid-level practitioners strongly affect the common understanding and adaption of the strategy, thereby supporting the implementation and creating value for the organisation. Even though the results of these dynamic, embedded practices are difficult to measure, the effects they have on the economic outcome of the organisation are obvious.

4.6.2 Knowledge-based view and learning

The *knowledge-based view of the firm* (KBV) (Grant 1996; Hoskisson et al. 1999; Kogut & Zander 1992), started within the research of strategic management, is an interesting approach to theory building, because the studied practitioners' possessed level of knowledge of the strategy obviously affected their activity and engagement in strategy processes. Knowledge-based resources are socially complex and difficult to imitate, thus providing potential to produce long-term sustainable competitive advantage (Alavi & Leidner 2001). Respectively, the mid-level practitioners' knowledge is embedded in the organisations' ubiquitous social practices and, as it is largely tacit and intangible, this knowledge is often understated or taken-for-granted. As it is more process-oriented, KBV enables a wider perspective with which to examine practitioners' roles, linking them to dynamic processes of interaction, learning and innovation (Hoskisson et al. 1999) that emerged as being critical for common understanding and implementation of strategy. As Grant (1996) explains, organisational capabilities are created through knowledge integration in complex, informal activities that demand cooperation and the deploying of knowledge as a fundamental organisational activity among organisation members.

Opposite to the traditional view of strategy implementation, KBV as well as the practice perspectives, emphasise the importance of horizontal knowledge-sharing (Balogun & Johnson 2004; Grant 1996; Ikävalko 2005; Weick 2001). In this research the horizontal knowledge flows and relationships between mid-level practitioners have also proved essential for the common understanding of strategy, especially within multilevel organisation structures and global environments. The mid-level practitioners' facilitate tasks in an attempt to integrate and coordinate the headquarters' guidelines to their own organisation's goals far more influentially than top-down, one-way information distribution. As Grant (1996) also argues, these kinds of coordination mechanisms, through which firms integrate, rather than solely transfer their members' specialist knowledge and efforts in order to build organisational capabilities, are essential.

Examining the mid-level practitioner's active role in strategy implementation and applying the ideas of the knowledge-based view is fruitful, while the

practitioners' clearly have a critical role as primary actors integrating and coordinating knowledge between the different organisation levels, as Grant (1996) and Cross et al. (2001) state. Their position and role is at the core of the organisations knowledge creating processes (Nonaka & Toyama 2003) and informal, effective relationships (Cohen & Levinthal, 1990; Cross et al., 2001). Furthermore, the practitioners had interrelating boundary-spanning activities across the unit boundaries, through which the global and local sensemaking and learning is enabled, as Pappas and Wooldridge (2002; 2007) suggest. Even though some mid-level practitioners included in the data had a very independent and proactive role, they expressed the view that managerial coordination and empowering of the employees was needed, as Grant (1996) also argues. Informal knowledge-sharing and creation could be strongly managed by these proactive mid-level practitioners, but are still formally defined as managerial duties and responsibility.

Nonaka and Takeuchi's (Dalkir 2011, 71) *knowledge creating spiral* is apt for understanding the dynamic processes that combine 'dialogue and practice' in the context of strategy process (see figure 12). However, they are rather challenging to apply as part of the often very linear strategic management processes. Nevertheless, for the purposes of this research it is useful to note that all phases of the knowledge spiral are relevant in strategy implementation processes. At an explicit level, the strategy is communicated through the hierarchical structures of the organisation, i.e. through vertical processes. The most challenging parts of the process are the phases that involve implicit and tacit individual knowledge, i.e. the informal sensemaking processes, translating the explicit knowledge to tacit understanding and internalising the knowledge, as well as the socialisation process, where individuals exchange tacit knowledge, when implementing the strategy in practice. Tacit knowledge can be revealed through its application in practice (Grant 1996; Kogut & Zander 1992), combining the knowledge and practice perspectives tightly together. The implementation processes are characterised by ubiquitous tacit knowledge processes that are not sequential, but instead, dispersed temporally. This dispersion takes place in many formal and informal, more or less planned, face-to-face, peer-to-peer or group-to-group, as well as digital, encounters and forums, which Nonaka and Konno (1998) call 'ba's, i.e. shared bases for emerging relationships, originally proposed by Japanese philosophers.

However, the knowledge creating encounters or forums are not self-evident, but they do need to be planned, organised, executed and managed. These practices are not easily carried out by managers themselves, as they focus more on the economic outcomes; nor the grassroots employees, who act without seeing the big picture of the cooperation needed within the organisation. Instead, the mid-level practitioners seem to have an opportune role and position to plan and organise meetings and encounters of organisation members in order to enhance interaction and cooperation, and thus coordination of goals and practices.

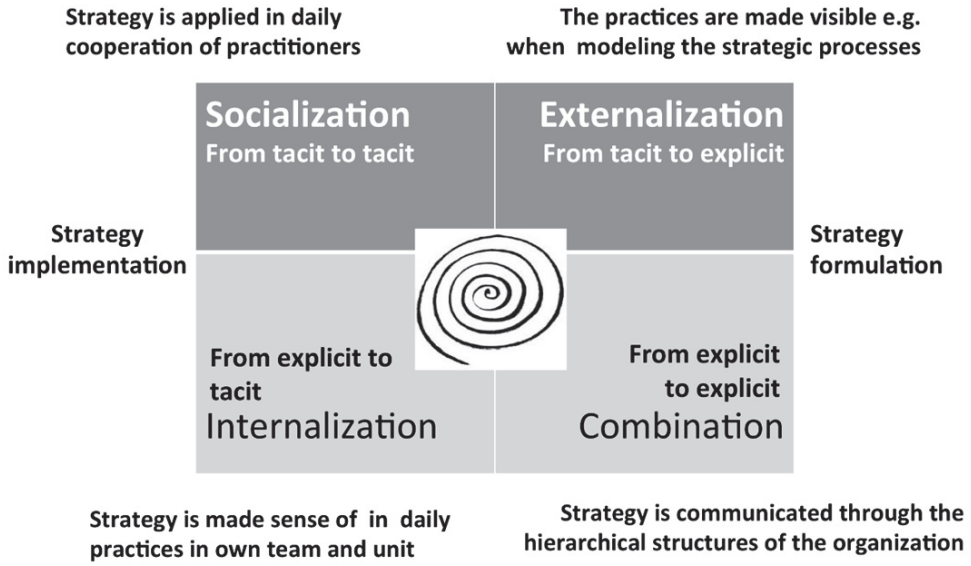

FIGURE 12 Applying Nonaka and Takeutchi (1995) knowledge spiral in a strategy process context

Dalkir (2011, 23-24, 53-54) presents a simple *integrative cycle model* (see Figure 13) to manage complex, information overloaded work environment and increase the individuals' and organisations' awareness and understanding of the strategy in order to put the knowledge to work. In the model the transition from knowledge capture or creation to knowledge-sharing and dissemination is realised through assessing the knowledge content and further, through contextualisation to knowledge acquisition and application. Contextualisation means translating the content to end-users to be rooted in the business processes, i.e. implementing the knowledge in the organisation.

Dalkir's (2001, 54) management oriented model can be applied to understand the process of strategy implementation. However, the picture becomes more complicated *from the middle*, and needs to be used more dynamically in order to understand processes where knowledge-sharing and creation occur at the same time, at both global and local, micro and macro levels. This can be a mid-level practitioner's role in a subsidiary, communicating the strategy between the headquarters and local subunits. Similarly, the 'contents' of knowledge needs a rethink in this application, because new and innovative knowledge can be created in the subunits, and concern strategic renewal at local level and new thinking of social cooperation when implementing strategy.

Applying the model to understand strategy processes from the practitioner perspective in a complex global context also requires action at horizontal and cross-cultural levels. Hence, the model cannot be applied solely as a managerial process, nor as an ICT or HR process. The model can, however, be modified and applied to understand a mid-level practitioner's role

in multilevel, top-down and organic knowledge creation, sharing and application processes. In these kinds of processes, knowledge is created and the assessing, updating and contextualising take place throughout all the phases of the process.

FIGURE 13 Applying Dalkir's (2011, 54) integrative model for knowledge creation from the middle of the strategy process, between HQ and subunits

The mid-level practitioners act as mediators in organisations receiving, translating and conveying information to answer the different employee groups' specific needs and level of understanding. For example, a management assistant operates as a kind of advanced translator of the strategy, projecting it in all directions of the organisation, also in an international environment. They are easy to approach, having a neutral role between management and grassroots level, possessing good communication skills and a will to facilitate. Assistants schedule, plan and organise meetings, strategic events and workshops, or 'ba's (Nonaka & Konno 1998), where strategic knowledge can be created and shared. They take part in the socialisation processes, documenting, compiling, translating and mediating the knowledge that is created and exchanged on these occasions. Communications officers can have a similarly active role in advancing strategic knowledge adaption among personnel, through telling stories of successful practitioner roles when implementing strategy. Middle managers have a multilevel role of encouraging, facilitating and supporting the processes of knowledge creation and sharing in their own business unit.

As *learning* is closely linked to knowledge creation and the application of knowledge, it is important to understand these linkages in order to understand practitioners' processes of adapting and applying the strategy, as well as their

practices of creating organisational knowledge that is tightly embedded in the relationships and context. Wenger's (2000) idea of learning as a social competence and personal experience, building on human needs of belonging, well describes the studied mid-level practitioners' experiences. Especially those of the management assistants, who described how they learned and built competence in constant social cooperation and that through these processes their empowerment increased as their competence and experience accrued. They expressly mentioned that these processes were behind their active strategic role. Similarly, Zimmerman and Rappaport (1988) described empowerment as a sense of personal competence, desire and a willingness to take action.

From the mid-level practitioners' perspective, different kinds of social forums were a natural context for their interaction about the meaning and contents of the strategy and the needed actions to support the implementation of it. However, Wenger's (2000) CoPs (communities of practice) were mentioned by name only in one case organisation, but these kinds of communities were frequently mentioned as useful for strategic sensemaking, for example management assistants had informal groups where assistants from different levels and units of a multinational organisation shared knowledge and learned from each other. Furthermore, some HR and communications specialists mentioned these kinds of groups as forums for sensemaking. Middle managers would probably also benefit from their own CoPs, especially when they feel isolation and exclusion from strategic sensemaking, like in the case organisations where units were geographically dispersed. CoPs are especially relevant when studying the boundary processes between the communities, where different competencies and experiences can be exchanged, enabling new learning beyond one's own perspective, but also tensions and conflicts can occur. Seely Brown and Duguid (2001) suggest that the focus in research has been too much on the idea of a community of practice, instead of on the implications in practice. This research has focused on the *activities* in the social systems as part of practitioners' roles in the strategy process, revealing the impact of implicit and tacit activities for successful strategy implementation. Furthermore, the results imply, as Corbett (2005, 186) also suggests, that individual learning and cognition play a central role within the success of organisations' entrepreneurial mind and action, and thus successful performance.

The importance of both formal and informal forums of social sensemaking and learning is clearly increasing within organisations. For example, in these case organisations strategic workshops became distinctly more frequent during the time of this research. The practitioners' sensemaking processes in strategy implementation are dynamic, continuous learning processes, involving actors at all organisation levels. The studied practitioners perceived that the top-down strategic information was effective and useful, but most of all they wanted to obtain the strategic knowledge concerning their role and tasks from their own superior and in their own team. The informal sensemaking with managers and colleagues was perceived as most essential in order to understand what the strategy means in practice. In order to mediate the strategy forward in the or-

ganisation, the mid-level practitioners facilitate the systematic and organic learning processes of employees by organising meetings and workshops, encouraging and documenting discussion of the strategy, helping employees to understand what the strategy means in their own organisation and helping the execution of strategy through interpreting daily queries.

4.6.3 Agency and Activity based theories

Agency theory in organisational research is criticised for being narrow and ignoring the complexity of organisations but at the same time considered as offering interesting insight into cooperation relationships (Eisenhardt 1989). In strategy research the traditional view separates managerial thinking and employee agency, nourishing differing attitudes, values and interests in organisations. Hence, the traditional concern of agency theory occurring when the *principal* and *agent* of the relationship have different *goals* can be relevant, from a strategy implementation point of view.

However, as Eisenhardt (1989) also states, agency theory only partly explains the multilevel, complex organisational relationships and thus demands complementary theories in order to understand agency in the organic and social systems and networks found in organisations. Moreover, the results of this research suggest that it is worthwhile believing that mid-level practitioners uphold consistent goals within the organisation and a will to act according to them, when they feel they are respected as practitioners in the community.

Eisenhardt (1989) proposes that the agent is more likely to behave in the interests of the principal and the organisation, if he/she has relevant information. The relationship is continuous and outcome based, rather than behaviour-based. Respectively, in my research, the practitioners perceived obtaining strategic information and knowledge as essential for an active, visible and sustainable role in the organisation's strategy process. They accepted the organisation's goals as their own and felt that strategy was 'behind' all activities, thus working towards the organisation's successful outcome. However, the practitioners' perception did not depend on economic factors that are the basis of organisational agency theory, but rather on their *professional identity* and pride — having a feeling of trust, empowerment, support, as well as resources and working in an entrepreneurial manner. This kind of well-developed and reliable performance can be compared with Weick and Roberts (1993) description of the collective mind, building on on-going social interrelating and cooperation.

Hence, rather than studying delimited agent — principal relationships, I believe, like Barker (2005, 240-243), Ellingson (2011) and Piekkari and Welch (2011), that human agency needs to be studied holistically in order to understand its complexity. Barker sees agency as the *individuals' capacity to act independently* and to make their own free choices, while structure means factors that determine or limit an agent's decisions and actions. Similarly, in this research, concepts of agency and innovation are seen as important because, as Barker (2005, 243) puts it, 'they underpin the possibility of identity and social change

and that human beings can act purposefully and creatively when encountering change'.

Within the scope of Strategy-as-Practice, strategic agency is based on social sciences, for example, Giddens' philosophy that determines individuals' capacity to have a perceived effect through own work that the individual regards as beneficial to the interests of his or her organisation (Mantere, 2008; Masalin, 2014). In the context of social interaction, S-as-P literature provides insights into understanding embedded human agency as micro-level practices and praxis, thus offering an alternative to performance dominated analysis (Jarzabkowski & Spee 2009; Vaara & Whittington 2012). Jarzabkowski and Spee (2009) and Whittington et al. (2006) recommend studying concrete modes and episodes of creating strategy and implementing it, such as knowledge sharing, meetings and workshops, as a new avenue of S-as-P research. Current research studied the participants' practices and perceptions during these episodes and made visible knowledge sharing and creation activities taking place in them.

Moreover, the practice perspective offered tools to this research to recognise and document the mid-level practitioners' essential activities of facilitating strategy processes, communicating the strategy in the organisation and organising, coordinating and supporting the implementation of strategy. According to Masalin (2014), essential for *communal strategic agency* are strategic group work and dialogic workshops, offering opportunities for face-to-face interaction, creating high quality connections between individuals, transmitting respect and trust through these connections and thus bringing forth *emotional energy*. Through my data it seems that interaction, especially face-to-face cooperation, contributes to common understanding, learning and activity, and thus positively experienced agency.

Engeström's (1987; 2001; 1999; 2003) *activity theory* offers some answers to the 'how' question of successful strategy implementation, linking social and individual learning and transformation in a network of interconnected systems. I utilised the activity theory most prominently in the longitudinal action research I describe in the fifth essay. According to Engeström, the *activity system* carries multiple layers of history in its artefacts, rules and conventions. The *tools* and *signs* can be seen, for example, as strategic guidelines, the yearly schedule for strategy process, or the business plan, describing the *actions* needed to achieve the organisation's *goals*. The *division of labour* in the activities creates different positions for the participants with their own diverse histories. The *subjects* can be seen as the practitioners cooperating in the strategy process. The *rules* of strategy work in the organisation provide an interesting discussion: are they in line with the new strategy, or do they mainly manifest the hierarchical and bureaucratic rules of the organisation?

Also in my data, the framework of activity theory clarifies the central challenges, contradictions, historically accumulating structural tensions within the activity systems of strategy processes. My findings capture Engeström's main principles rather well, for example, the multi-voicedness and historicity, i.e. giving voice to the practitioners in the activity system. As Engeström (1999; 2003)

suggests, theory building attempted to link social and individual learning and transformation in a network of interconnected systems of strategy processes. The individual learning experiences grow in interaction into common understanding of the organisation's strategy, and transform this understanding to cooperation and implementation activities. Through these activities, individuals can develop their competence and build their identity and position in the organisation's social network in the strategy process and simultaneously find meaning for their work and help realise the organisation's goals.

4.6.4 Social and organisational theories

The roles of mid-level practitioners seem to be highly social in the strategy implementation processes at several organisation levels depending more on cooperation than on the attitudes of single individuals. Hence, this research is concerned with social and organisational concepts and theories that see the practitioner as a part of successful organisational behaviour and performance. Particularly interesting from the point of view of my research is the latest view of organisational research focusing on positive development in organisations. *Positive organisational scholarship* brings together organisational, psychological, sociological and philosophical ideas and addresses phenomena such as engagement, proactive behaviour, intrinsic motivation and the meaning of work (Cameron et al. 2009; Rosso et al. 2010).

The research on employee engagement, according to Albrecht (2010, 3–7), is linked to several theories that are also interesting for research into the employee's role in strategy implementation; for example, role theory (Kahn 1990), self-determination theory (Ryan & Deci 1985), job characteristics theory (Hackman & Oldham 1980). Social theories have found several predicting factors through which engagement can be enhanced such as job characteristics, support, rewards and recognition, cognitive, emotional and social resources, as well as skill variety, autonomy and leaning opportunities (Albrecht 2010). Job resources and engagement together increase intrinsic motivation and proactive behaviour (Salanova & Schaufeli 2008), and feelings of self-determination and well-being (Ryan & Deci 2000). The mid-level practitioners interviewed here clearly stated that the main drivers of their engagement were the feelings of trust and respect in their social network, including in particular daily cooperation with their superiors. Therefore, it seems that at least among mid-level practitioners, building engagement cannot be done while neglecting the social aspects, solely using mechanical or economic means.

Much of the research on these phenomena has previously concentrated on personal aspects instead of features related to the working practices or social cooperation at work. It is obvious that personal factors also influence employee involvement and engagement; still I believe like Bakker and Schaufeli (2008) that everyone can engage and like Senge (1990/2006) that people inherently want to learn. I also believe like Wrzesniewski et al. (2013) that the *processes*

through which work attitudes are created are more important than solely the predictors and outcomes of them.

Robertson et al. (2012) state that research evidence clearly shows that higher psychological *well-being* is linked with improvements in individual behaviour and performance, and hence, organisational *effectiveness*. Similarly, the mid-level practitioners involved here are satisfied with how they performed in the strategy processes of their organisations, they were dedicated and active, focused on achieving the organisation's goals, perceived they were respected as practitioners, and the tasks they did were worthy and meaningful, albeit not always strategic or salient. They were therefore physically, cognitively and emotionally connected with their work roles, and taking a positive stand to working for the organisation's goals (Bakker 2011; Kahn 1990). Empowerment and engagement among mid-level practitioners are clearly manifested through their *proactive behaviour* as Salanova and Schaufeli (2008) also states, and *organisational commitment* as proposed by Hakanen, Bakker and Schaufeli (2006). Moreover, the possibility to influence and plan one's own work would enhance the practitioners' commitment and involvement as well as cultivate the positive work identity of employees as Mathieu and Zajac (1990), Rhoades and Eisenberger (2002), Tilev and Vanhala (2014) and Wrzesniewski et al. (2013) also suggest.

Research on the *meaning of work* according to the review by Rosso et al. (2010) is widely dispersed across psychological, sociological, economic, organisational, philosophical and theological disciplines and linked to important outcomes from organisational studies that this research is also interested in, such as work behaviour, empowerment, engagement, individual performance and well-being at work. Much of this research has concentrated on single sources of meaning studied mainly from the psychological perspective in isolation from other sources, while the social aspects and mechanisms of how work becomes meaningful often remain implicit (Rosso et al. 2010). In strategic management research, the social aspects are often neglected, but according to my findings they are worth taking seriously, having potential to increase the results of organisations through increasing the engagement of employees and the feeling of the meaningfulness of the work. Through social activities in strategic processes, mid-level practitioners not only found meaning for their own work but they also helped and encouraged other organisational members in their activities when implementing the strategy. The organisational members mutually found meaning in the social cooperation and the feeling of belonging in the working community, also proposed by Wenger (2000). The social activities of the practitioners contributed therefore to the positive working culture in the organisations. Inversely, it seems strategy has the potential to increase the practitioners' experience of the meaning of work as a social and cultural construction involving 'meaning making' or 'sensemaking' as Weick (1995) puts it. The successful mid-level practitioners stated that knowing the strategy enhanced their understanding of the 'big picture' of the work in the organisation, enhancing their feeling of empowerment to act independently in strategic work. Mantere (2005)

also found that championing strategy and adaptive practices provides a sense of *purpose* and motivation for individuals, increasing the performance of strategy.

The narratives of the mid-level practitioners can fruitfully be compared with SHRM constructs of *high involvement* or *high performance work systems* (HIWS or HPWS) with involved and motivated employees working proactively to meet the organisations' goals and continuously enhancing their skills (Armstrong 2011, 166-167; Boxall & Purcell 2005, 77-78, 120). This kind of work system parallels the AMO framework that sees performance as a function of employee abilities, motivation and opportunities to participate (Armstrong 2011, 10; Boxall & Purcell 2005, 5, 122).). Even though these working systems sound flawless and definitely provide the basis for developing working cultures, it is simultaneously essential to notice that the results of studies are most often based on large surveys or interviews with HR personnel, both methods remote from the employees' real concerns in strategy work. The challenge of the frameworks and systems is that they are affected by several human, situational and context-bound variables involving psychological contracting that in turn incorporate issues of fairness and trust (Boxall & Purcell 2005; Guest 2004). In the case of the mid-level practitioners in this research, the frameworks seemed to work well. Through the qualitative interviews I discovered why and how these ways of working succeeded more fully than through the surveys, which in the beginning phases of this research did not always capture the real feelings of the participants.

Gulati, Nohria and Zaheer (2000) suggest cultivating a *relationship perspective* in strategic management research in order to understand how the social context of enduring intra and inter-firm relationships influence the learning, conduct and performance of firms and provide access to information and resources. Applying the ideas of Gulati et al. (2000) to understanding the strategic cooperative relationships where mid-level practitioners adapt and apply, coordinate and integrate a global strategy in the local environment (i.e. share and create knowledge, learn and help the whole organisation learn) can count as valuable and imitable resources as Barney (1991) and Gulati et al. (2000) state. These activities can moreover be explained through Cohen and Levinthal's (1990) *absorptive capacities* and innovative organisational performance depending on the individuals at the interface between the subunits within the firm. Integrating the specialist knowledge of practitioners and achieving effective coordination requires group coordination through scheduled and unscheduled meetings (Grant 1996). However, studying the individual relationships behind these activities would lead the results rather far from the perspective of successful organisational processes. Hence, more relevant than personal relationships are the *professional relationships* between supporting personnel at different organisational levels in order to also understand how to apply and support these kinds of valuable social activities more generally.

Cross et al. (2001) propose *social network analysis* to understand how people create and share knowledge in networks, making these interactions and the

organisational learning visible and thus actionable. In order to promote strategic collaborative relationships it is important to understand how knowledge flows across boundaries between functions and units in and outside organisations, as well as the relational characteristics among strategically important groups. In addition to the formal knowledge flows, the informal networks and forums also need to be understood and facilitated (Davenport & Prusak 1998).

In this research, awareness and application of knowledge flows proved to be particularly important in the contexts of headquarters and subunits and in the international environment, where the common understanding and the meaning of trust creation becomes critical (Essay 3). Cross et al. (2001) identified middle managers as playing a key role in knowledge sharing within the group. In my study I found in addition to intra group knowledge flows, similarly essential mid-level practitioner roles providing information across organisation levels and unit boundaries. Mapping these networks of mid-level practitioners could increase our understanding of the strategic cooperation mechanisms, make the essential sensemaking links visible in strategy implementation and help facilitate the elementary relationships and better cope with situations where strategies, people and organisational structures change. Particularly fruitful would be to map strategic collaborative relationships that cross boundaries, as also Cross et al. (2001) state. Even though in my data, for example, the critical role of executive assistants in strategy implementation processes in the international environment is recognised, making it visible proved to be challenging because of the informal and interactive character of the interaction behind the hierarchical structures of the organisations (in particular organisations 2 and 7). The practitioners did not want to make visible their informal networking. Another reason for not comprehensively mapping the organisational relationships was the multiple-case character of the research design focusing more on the practitioners' roles and comparing them with each other in different kinds of organisational contexts in order to understand the phenomenon at a more general level.

4.7 The theory generation

I start the theory generation by considering the goals and demands for quality for the theory I seek to construct. First of all, I need to answer the research question: **How can mid-level practitioner's successful role be constructed in strategy implementation?**

The most difficult parts of understanding a phenomenon are the *how* and *why*, as also Silverman (2001/2010), Sutton and Staw (1995) and Whetten (1989) state. The *interpretive* logic, consistent with the *constructivist* approach strives in particular to imaginatively understand the studied phenomena, interpret and conceptualise how the participants construct meanings and actions based on their view of reality (Charmaz 2006, 126-130). Applying the ideas of Charmaz

(2006), I seek a constructivist theory that does not settle solely with understanding but attempts to learn with the participants how the studied experiences are embedded in larger or hidden situations or relationships. Hence, the theory needs to be able to describe the *phenomenon* i.e. the successful mid-level practitioner's role in the strategy process and how the role can be constructed as an essential part of sustainably successful strategy implementation. The constructivist logic demands an awareness of and reflecting on the iterative nature of the research process, own and participants' presuppositions, the multiple realities and vantage points of lived experiences and the subjectivity of the theorizing (Charmaz 2006, 130–132), aiming to show the 'complexities of particular worlds, views and actions from the point of view of those who live it' (Locke 2001, 8). A pluralist paradigm view makes it possible to build a more comprehensive and multidimensional picture of a pioneering phenomenon, such as a strategic employee role in the strategy process, providing more dynamic means to answer the 'how' questions (Gioia & Pitre 1990; Mason 2006).

The *role* consists of several relevant *concepts* implied through the findings in this research and related literature. To generate theory I need to 'constitute plausible relationships among concepts and sets of concepts' as Eriksson and Kovalainen put it (2008, 156, 159). Theorizing means 'thinking through, with and about the data' (Coffey & Atkinson 1996, 139; Silverman 2010, 356),' stopping, pondering and thinking anew' (Charmaz 2006, 135) and 'going beyond the data', using developing, generating and integrating ideas systemically towards a more general, abstract level of analytical thought, intellectual resources, theoretical and methodological perspectives and traditions (Coffey & Atkinson 1996, 139-153).

The solution to strategy implementation problems can be related to many elementary factors in research previously identified that are obviously similar in different kinds of cases such as 'communication' or 'trust'. Even though such elements would be obvious, the understanding of *how* to achieve them is challenging. Moreover, minor and contextual details can also assume significance more generally. My objective is to comprise and conceptualise the relevant relationships into a coherent and meaningful whole that is justified and more abstract and thus applicable in different contexts.

The *narrative* view made it possible to construct the mid-level practitioner's role and identity through the more tacit understanding and perceptions of the practitioners. Applying narrative analysis, according to Chase (2011, 427–429), implies the need for social change and a demand to be heard. In this spirit my research seeks to increase the understanding of the all too often understated active roles of practitioners in strategy processes, and therefore, to develop working cultures in organisations, enhance employee engagement and the success of strategy implementation. Hence, the conceptualisation was created in cooperation with the practitioners, truly seeking to understand and interpret their point of view and the organisational realities of their role and activities and then refine and extend them through theoretical coding.

The *theoretical background* of analysing the practitioner's role in the strategy process and implementation lies in the practitioner's perceived capabilities as an organisational *resource*, interlinked to *process* and *practice* perspectives in the context of *organisational* and *social* practices that enable the *activity, interaction* and *agency* of practitioners as well as their *engagement* in strategy processes. The story emerges, as Coffey and Atkinson (1996, 45–52) state, from diffused practices and perceptions of practitioners towards an attempt to talk about a new ways of looking at the roles of practitioners in strategy processes as empowered and engaged actors, implementing and facilitating strategic changes in an enabling context in organisations, perceiving the meaningfulness of work and a strategic identity.

The core of the theory building is in the *perceptions of practitioners* and how they experience their role in the processes. However, the researcher's role is relevant not just for giving the practitioners a voice but also bringing the phenomenon to a more general level and beyond the emic explanations of the practitioners. Even though I examine the perceptions from the point of view of individuals, individuals represent their professional roles in the context of the strategy process in the organisations. This contextual focus makes it possible to reflect on the research question through broader lenses as there are more similarities in the professional practices and strategic procedures in organisations than if exploring purely individual perceptions or personal ways of working.

4.7.1 Mid-level practitioner's strategic role and identity

The *concept* of a 'role' is multidimensional, simultaneously comprising both professional and social aspects. A role, in a work context, is formed not solely by the subjects' own perceptions, but also by the community's assessment. Roles take shape in the interaction and communication between the subjects and the social context in constant cooperation. This dynamicity is studied in more detail and visualised in essay 5. The dynamicity also affects the studied phenomenon embedded within this interaction.

The research on the phenomenon on a successful practitioner's role in strategy implementation is dispersed in silos of different disciplines, so that *firstly*, strategic management research does not see the practitioners' role as strategic or capture the perspective of practitioners when implementing strategy, and *secondly*, in organisational and psychological traditions the practitioners are studied more as individuals than implementers of organisational strategies. Bridging the perspectives significantly increases understanding of the roles in strategic contexts, enabling constituting a practitioner's strategic role, as Floyd et al. (2011) and Mahoney and McGahan (2007) also recommend.

In between the perspectives of strategy and people, I need to define what I mean by '*strategic role*'. The traditional view still sees all employee actions as operational, even though it is largely accepted that separating thinking and doing, i.e. strategy formulation and implementation, from each other does not lead to successful implementation. Accepting strategy implementation as part

of the strategy process correspondingly demands adopting the agents of this process, i.e. the practitioners. Hence, it is logical to argue that the practitioners' activities when implementing strategy are 'strategic' and that the practitioners' role is correspondingly 'strategic'. These justifications are compatible with the concept of the 'strategic actor' (Johnson et al. 2003; Whittington 2006) or the 'strategic agent', capable of carrying out strategic action and having a crucial role in strategic success (Mantere 2003; 2005; 2008), as well as a practitioner's role as the *practices they have in the strategy process* (Johnson et al. 2003; Jarzabkowski 2004; Carter et al. 2008; Regnér 2008).

Even though these definitions are reasonable, it is still challenging to define what constitutes a strategic role and what activities exactly require when 'implementing the strategy'. Applying Aaltonen's (2007, 26-30) definition of strategic activities as those that 'the organisation members relate to the realisation of strategic goals', the strategic role emerge as 'organisation members' perception of their professional role and identity related to the organisation's strategy'. Practitioners' strategic role and activities are thus *relative* phenomena and need to be made sense of in every organisation, uniquely. However, I argue that through better understanding of practitioners' successful roles and activities in strategy processes within different kinds of organisations, we can also more generally recognise these phenomena in new contexts.

On average, employees do not often relate their tasks and role to strategy, and similarly the practitioners' role and identity in the data grew like-wise, mainly from their *professional capabilities* that were based on either *education* or *experience,* or both of these. Studying successful strategy processes' acting practitioners' roles and identities, underlined, in addition to education, the importance of knowing the business, strategy and organisation, continuous learning, studying new ways of working and keeping up-to-date with the technical development. Similarly, Alvesson and Willmott (2002) state that identity in a work environment can be constructed with overlapping and related concepts, such as professional or occupational affiliation, organisational position, social values and self-awareness of own values. Moreover, as the studied practitioners expressed that they enjoyed continuous learning and applying their knowledge and skills in their daily practices, their learning patterns qualify as *organic learning* (Huy & Mintzberg 2003). Correspondingly, their role can be expressed as *dynamic* and constantly developing, rather than as a professional position, from a structural point of view. The role does not mean singular, ad hoc practice, albeit effective, when implementing a new strategy, which is the linear, top-down view.

Practitioners' roles were shaped through *interaction* in their *cooperation network,* which, especially at the mid-level of the organisation, is strategic — spreading wide in all directions, up and down, as well as in and outside of the organisation. Interaction characterised the mid-level practitioner's role to the extent that in essay five I described and illustrated role construction through the elements of interaction. The interaction occurred not only in the formal structures of the organisation, but also in complex informal social webs of relation-

ships, as Ibarra and Andrews (1993) state. An in-depth exploration of the strategic practices, however, made these relationships visible. Through this network, the practitioners obtained the knowledge and understanding of the strategy, but also composed meaning to the work in these dynamic, interpersonal, sensemaking processes, in cooperation with people, as Wrzesniewski et al. (2003) also state.

Accordingly, *social* aspects were substantial for the practitioners' role and identity building in their organisational community. The practitioners wanted to help the whole organisation be successful and achieve its goals according to the strategy and business. Their roles clearly manifested as good *organisational citizens* (Organ 1988; 1998) with a *helping* aspiration and organisational loyalty (Podsakoff et al. 2000) and *empowered champions*, facilitating and supporting strategic cooperation within the organisation (Mantere 2003). Through these activities they perceived their work was purposeful for the community and they found not only meaning in their work role, but also communion with self and others in the organisation, as Rosso et al. (2010) also state. The mid-level practitioners had key multilevel positions in successful cooperation within their organisations' networks.

Moreover, the studied practitioners were highly *engaged*, perceiving the organisation's strategy as the most important element in guiding work within the organisation and their engagement, taking shape through multiple levels of influences from individual, interpersonal and organisational levels (Kahn 1990). They experienced great *intrinsic motivation*, with their roles being highly active, energetic, dedicated and strongly involved (Schaufeli et al. 2002; Bakker 2011). They planned their own work, as well as that of the whole organisation and management, cooperatively and proactively, allowing them to feel significance and professional identity (Wrzesniewski et al. 2013), enjoy skill variety, autonomy and constant leaning opportunities (Bakker 2011), and show a capability to move flexibly and be self-organised between activities and assignments (Alvesson & Willmott 2002). Also showing feelings of self-determination and well-being (Ryan & Deci 2000).

From the organisation's point of view the practitioners were also extremely effective and skilful, not only with their own tasks, but also in helping others to achieve the organisation's goals. They not only facilitated the learning processes of the organisation, but also contributed to the formulating of local strategy aligned with the organisation's capabilities and the market related goals. The practitioners' role was particularly essential as a mediator in the organisations' cooperation networks, helping with daily strategy implementation and the common understanding of the strategy. Hence, I can draw a conclusion that practitioners have capabilities that qualify as *valuable and imitable resources* (Barney, 1991; Gulati et al., 2000), as *absorptive capacities* (Cohen & Levinthal 1990) and *integrative capabilities* (Grant 1996), or organisational *alignment* skills (Powell 1992). I argue that recognising a mid-level practitioner's substantive role, capabilities and potential, encouraging them to use their skills self-reliantly, as part of their professional role, would benefit the implementation of the strategy, and

thus, the whole organisation. The most essential 'means' regarding the practitioner's strategic role is *awareness* – by managers' and employees', as well as researchers' – of the strategic potential of practitioners.

Like Beech (2008), I argue that *dialogue* provides 'a route from the outside to the inside of an identity', and the tensions in identities need to be made sense of in a social context in order to develop the identities and their potential. The formation processes of identity are relevant when establishing trust, power and communication in collaboration (Beech & Huxham 2003), which are essential for successful strategy implementation. Obviously, personal characteristics also affect the perception of one's own role, but in the context of strategy work the cooperation, and therefore *social* elements, are more relevant than psychological phenomena.

The strategic role of the mid-level practitioner is formed of several interlinked concepts in a complex context into one coherent whole, which can create a new meaning for practice and contribute to strategic management traditions, working from a new viewpoint. Mid-level practitioners' boundary-spanning position — vertically in between management and employees, horizontally in the network of different functions and units of the organisation — can be the bridge, integrating 'thinking and doing', i.e. strategy planning and implementation or strategy and organisation. Similarly, through the mid-level practitioners' central role, the integration of organisations' exploring and exploiting activities can be helped in dynamic processes, enabling both the using of existing capabilities efficiently and the creation of new capabilities. Strategy can be used as the tool to make the leap visible across existing gaps. It needs to be opened up for use by strategy implementers, instead of solely being a managers' priority. According to Heideggerian thinking, the strategy should be 'available', constructed as part of everyday practical coping and put to use, instead of just scrutinising it for its properties (Chia & Holt 2006).

4.7.2 Interaction, knowledge and learning as elements of successful strategy implementation

Interaction, in terms of daily cooperation, regularly occurring in formal or informal forums, like meetings and workshops, was characterised by mid-level practitioners as one of the most successfully experienced strategic activities. The level of interaction and the width of the network enabled the obtaining of strategic *knowledge* and understanding of the meaning of the tasks and practices from a wider perspective. The interaction led to understanding the strategy, *learning* what it means to one's own unit and work, as well as to the *adaption* of new ways of working, according to the strategy in daily cooperation. Knowledge and learning were closely intertwined in these processes, leading to similar kinds of positive consequences and advantages — such as feeling proud, joy, a high self-esteem, empowerment or strength. Practitioners that had these positive experiences also felt that implementing the strategy, and helping organisation members to understand and implement the strategy, was their most important task.

Hence, at the level of concepts and theory, I have studied *interaction, knowledge* and *learning* as major elements that enable the practitioner's successful role and having potential to constitute *action* and *cooperation* in a successful strategy process and implementation. Interaction between people emerges as a clear umbrella construct, binding together the essential concepts of knowledge and learning. Like Brown and Duguid (2001), I suggest coordinating the strategy implementation efforts in organisations around knowledge and practice, in order to uncover and enable the innovative potential of employees.

The concepts of knowledge and interaction can manifest in multiple ways, from knowledge creation and sharing to learning and knowing. Knowledge combines theory and practice through learning processes (Small & Sage 2005; 2006) and increases capacity for effective *action* (Alavi & Leidner 2001; Huber 1991; Nonaka 1994). The concepts are also intertwined to an extent that it is difficult to say where the first ends and the other begins. There are several challenges in studying these processes and translating them into more general terms.

First, even though the linkages between the interaction, knowledge and learning in social contexts are widely recognised in different research traditions and highlighted in the research of strategic management by Cohen and Levinthal (1990), Gavetti and Levinthal (2004), Hoskisson et al. (1999) and Weick (2001), there are still challenges in understanding how to manage these processes and how to turn the learned knowledge into action. In organisations' strategy work the knowledge needs to not merely be transferred but rather *coordinated*, *integrated* and *applied* within the organisation, as Grant (1996) and Sull et al. (2015) also argue. According to my findings among successful mid-level practitioners, I argue that these processes need not be *ordered, managed and controlled,* but rather *enabled, empowered* and *encouraged*. The mid-level practitioners in the data could proactively coordinate, integrate and apply knowledge so that the employees better understood the meaning of the strategy, could apply it in a local environment and plan and learn new ways of working. These practices were enabled by the practitioners' empowered role and the trust they felt in cooperation with their superior and working community. Through empowerment they created dynamic, proactive, informal networks, where information was adapted, shared and created in a self-organising system that could also handle sticky information across unit and country boundaries, as proposed also by Ståhle and Åberg (2015).

Second, knowledge-sharing, creating and implementing are highly *social* and *organisational* human processes. Research recognises the importance of *lateral*, *informal* and *tacit* modes of communication in organisations. However, in mainstream strategic management research, these have been more or less neglected, even though they play an essential role in strategic sensemaking. According to my findings, the middle manager's role was crucial for the flow of information *within* groups, as Cross et al. (2001) also argue. Whereas management assistants' roles were pre-eminent in information flows *between* different groups, sub-units, functions and levels of the organisation. Even though ways,

channels and tools of communication are changing, strategic communication within organisations is still mainly based on the hierarchical and functional structures as Eriksson (2012, 127-128), Jarzabkowski and Spee (2009) and Kriger (2005: 165-172) also state. The solution I suggest is to *encourage, accept and make visible the informal interaction* between practitioners in strategy processes. Accepting the social networking character of communication, presumes a more decentralised, cyclic and creative nature for interaction and processes. Adopting a more voluntaristic way of seeing the individual, enables learning, innovation and self-direction of both the people and systems involved. In my data, the practitioners interacted effectively within informal networks; in order to share, make sense of and create strategic knowledge, but the managers in these organisations did not always recognise the significance of this interaction for strategy implementation. Like Juholin et al. (2015), I believe that in today's digital and global work environment, employees should be seen as essential strategic communicators and thus, as a valuable asset for organisations.

Third, solely the knowledge of the strategy is not enough. In addition, knowledge of the *organisation* is needed for its successful implementation, as Galbraith (1983; 1986) and Floyd et al. (2011) also state. The mid-level practitioners underlined that implementing strategy demands knowledge of the organisation's field, business, structure, people and interest groups, resources and capabilities, ways of interacting and working. As the most challenging knowledge of the organisation includes the highly social aspect of the organisations culture, with its sub-cultures in different units, areas, functions, departments and employee groups. This knowledge enables coordinating the functions and work efforts in the organisation according to the strategy.

Fourth, even though we know the elementary significance of interaction and knowledge in organisational processes, there remains a challenge, both in theory and practice, of how to constitute sustained active interaction that enables continuous learning and knowledge creation. Nonaka and Toyama (2003) ponder the discrepancy that even though the capability to create and utilise knowledge is widely considered as the most important source of a firm's sustainable competitive advantage, as outlined in Grant and Nonaka's seminal articles from the 1990's, we are still far from understanding the processes of creating and utilising knowledge. I argue, according to my findings, that when the practitioners feel they are respected, they obtain knowledge of strategy and they are accepted to be competent enough to plan their own work, according to which they proactively support and encourage the knowledge-sharing and creative processes within organisations.

Fifth, it is a challenge to create organisational knowledge and learning from individual knowledge. In this research, the organisational knowledge manifests, as Small and Sage (2005; 2006) also state, in a dynamic mix of individual, group, organisational and inter-organisational experiences, values, information, and expert insights. Correspondingly these insights are dispersed to be both explicit and tacit, at both micro and macro levels, and in between in the organisational realities. As such, learning experiences do not necessarily build

learning organisations, but through sharing knowledge and building more *sustainable social entities*, i.e. practitioners' strategic identities and roles, these, together with other identities in an organisation's networks can turn into professional learning for practitioners, thus providing constantly learning organisations. Since Senge's theory in the 1990s, many organisations name the building of a learning organisation as their goal. This ideal has, according to Garvin (1993), been problematic to apply, manage and measure in practice, because of differing ways of understanding the concept and focusing on too simple measures of outcome, cost and price, instead of quality, changed attitudes or new ways of thinking, for example. The concept of a 'learning organisation', as well as Nonaka's knowledge creation theory, even though apt, dynamic and comprehensive, can be rather challenging for practice purposes in our often managerial oriented, linear thinking culture. These learning processes cannot be managed, measured and controlled, but rather enabled and encouraged, as they are more or less informal, often horizontal, not following the hierarchical structures of the organisation. Instead of top management knowledge processes that do not always encounter the real challenges of strategy implementation, we should pay more attention to practitioners' knowledge creating and implementing processes. Knowledge processes also demand informal learning opportunities, in addition to formal channels and forums.

Like Wenger and Schneider (2000) and Blankenship and Ruona (2009), I propose encouraging cultural, professional and practical communities of practice (CoPs) and informal networks, alongside formal meetings in order to share, create and coordinate knowledge of strategic relevance and increase learning at horizontal levels. Mid-level practitioners could be the inducing and facilitating resource of these forums. Middle managers need forums for mediating the strategy to their subordinates and teams and for enabling the dialogue on strategy. HR professionals could, in addition to arranging a yearly meeting for the personnel, more often organise informal meetings, in order to support the common understanding of the strategy among personnel. According to my data, management assistants were the outstanding event managers whose potential could be used more systematically to organise and facilitate strategic meetings and workshops, in order to enhance knowledge sharing and learning in organisations. Similarly, communications specialists' potential could be utilised more effectively as strategic 'storytellers' and as facilitators of the sharing and creating of strategic knowledge in organisations.

Garvin (1993) recommends surveys, questionnaires, interviews and observations as tools to measure learning, and thus, increase learning efforts. On the basis of my data, instead of one-way information gathering patterns, I would suggest rolling up the sleeves and putting efforts into daily *cooperation* or at least workshops together (e.g. in a global environment) where all parties can learn from each other and see the progress simultaneously. Moreover, opening up of boundaries and organising possibilities for *cross-functional* cooperation stimulate new ideas and new ways of seeing the practices. Still, just one 'round' of meetings and workshops is not enough to cultivate attitudes and create

change in action, continuous improvement and commitment to learning, as Garvin (1993) also states.

I propose opening up the strategy from being solely a managers' toy to all organisation members', in particular the mid-level practitioners' shared tool that enables the *dialogue* of the organisation's goals and actions that are needed to achieve these goals. The dialogue then enhances the *cognitive understanding* of the meaning of the strategy in daily practices. *Knowing* the strategy enhances the experience of the *meaning of work*. Understanding it, enables the *learning* of new ways of working and *cooperation* between individuals and teams, and thus a more successful strategy implementation within the organisation.

4.7.3 Practitioner's activity and agency in strategy implementation

Successful strategy implementation requires consistent action based on a shared understanding of the changes and means needed (Stensaker et al. 2008). What constitutes activity and agency is widely debated. The challenge lies in the dynamic nature of these phenomena as they emerge in a holistic and highly embedded web of individual, social and environmental factors. According to Mantere (2003), the emergence of agency demands sensemaking to understand the strategy, while Weick (2001, 27) proposes that action leads to sensemaking processes. Either way, action and sensemaking are closely intertwined and not separated as the traditional, linear way of seeing that thinking precedes action; that is, implementation follows planning. Moreover, organisations primarily focus on *explicit* agency at the organisational level. This research instead, digs deeper in the more or less *implicit* and *tacit practices* at the level of individual practitioners in the form of practitioner narratives. In order to understand the socially rooted practices, I have studied these from the point of view of those who perform them and simultaneously seek a micro-level understanding and a holistic view of what happens within cooperation and what proves to be successful for strategy implementation.

The successfully acting practitioners in the data possessed a good picture of the strategy and the working processes in their organisations, understood their role in the process and saw how they could contribute to strategy implementation. Even though the organisations' strategy processes were seemingly top-down and hierarchical – the strategic guidelines coming from the headquarters – the mid-level practitioners were *aware, empowered and active actors* in these processes. Their activities were *dynamic, proactive* and *boundary spanning,* increasing the common understanding of strategy and learning how to act according to it in between the different functions of the organisation, the head and subunits, local and global offices, and different groups of employees in their own unit. Cohen and Levinthal (1990) call the capabilities needed in these kinds of activities *absorptive*.

Applying Pettigrew's (1992, 9) classic guidelines for strategy process research supports both theoretical and empirical investigations and at the same time maintains a sense of coherence in the overall approach. Pettigrew suggests

exploring 1) embeddedness; that is, studying processes across a number of levels of analysis, 2) temporal interconnectedness; studying processes in past, present and future time, 3) roles as an explanation of context and action, 4) holistic rather than linear explanations, and 5) the need to link process analysis to the location and the explanation of outcomes. Employing Pettigrew's model provides the means to make the social embeddedness of the practitioners' strategic activities in strategy processes visible at different organisational levels and networks of interaction that are necessary for the practitioners, for example, relationships between headquarters and subsidiaries. Temporal interconnectedness can relate to calendar years that often steer strategy processes in organisations. Searching for the practitioner's successful role and activity in strategy implementation involves understanding human agency as a holistic explanation of the practitioner's activities and perceptions in these contexts. A holistic approach makes it possible to ground the model near the lived reality, as complex organisational phenomena compile several interlinked elements. Nevertheless, even though the processes and contexts are unique at the level of details and individuals, they clearly follow similar patterns at the organisational level; for example, the main steps in strategy processes in the data here tend to form rather similarly in different kinds of organisations.

The S-as-P analysis follows the same paths bringing to light agency that often passes unnoticed and is thus difficult to uphold or enhance. The value of these practices is hidden in complex interactions of tacit, highly contextual knowledge, having the potential to lead to successful firm performance and competitive advantage as Regnér (2008) also states. Recognising and fostering these micro-activities has significance for enhancing the organisation's resources and capabilities. The mid-level practitioners interacted between the levels and units of the organisation translating and sharing strategic knowledge through formal and informal channels and in daily cooperation. These practices also enabled knowledge creation in strategic changes in the periphery of the organisation and facilitated integrating and coordinating knowledge and work efforts in line with the global strategy, albeit applied in the local environment. The practitioners scheduled strategic change, organized and facilitated strategic events, meetings and projects, as well as documented and disseminated the created strategic information. Practices that enhance knowledge-sharing and creation are increasingly important for organisational viability as the need for global interaction and cooperation is growing. Still, these practices are often classified as non-strategic and unproductive because the outcome of them is visible in other units' revenues.

S-as-p thinking makes it possible to link these micro-level practices to organisational meso levels, seeing their value in organisational learning and strategic success. Some linkages are also possible to draw to macro levels and broader societal contexts as Aaltonen (2007), Jarzabkowski and Spee (2009) and Vaara and Whittington (2012) suggest, revealing the previously unsatisfactorily recognised potential of mid-level practitioners, often women, whose valuable facilitating work efforts are often less valued and paid in organisations. Em-

ploying the critical views of Knights and Morgan (1991), Mantere and Vaara (2008) and Neuman (2002) rather moderately, the macro perspective manifests giving voice to the practitioners, making their point of view visible in the managerially and economically oriented strategy work, and thus attempting to show that empowering such practitioners in strategy processes as active actors would release creative potential in organisations.

Furthermore, the challenge is to create *sustainable activity* and *agency*. Enabling and interactive cooperation between managers and employees seems to encourage both effective implementation activities as well as the practitioners' *creativeness* in developing new ways of working in global relationships. Hence, this cooperation enables a *balance between exploitative and explorative activities*, which have been a debated challenge since the seminal article by March (1991). Cooperation between managers and practitioners enables effectiveness, new learning and long-term success without needing to choose between these in the context of scarce resources. As March (1991) states, the balance in organisational change, performance and competitive advantage demand a delicate trade-off between the exploration and exploitation of resources, and taking into consideration both the contextual factors and the individuals' capacities such as knowledge, learning and renewal remaining as profoundly important instruments of human well-being. I suggest that this balance can best be created in *good cooperation between managers and practitioners*.

The main mechanisms to create the meaning of work are based on *agency and communion* as fundamental modalities of human existence and a sense of purposeful action (Rosso et al. 2010). Meaningful activities according to the organisation's mission, vision and strategy have the potential to increase the meaning of work for practitioners, but in research there are still challenges and obstacles on the way. Mantere (2005) argues that adaptive practices increase the experience of ownership, creativity, personal sensemaking and championing in strategy work. Furthermore, Luoma (2014, 148) found that a clear vision, active participation, communication and demonstration of progress contribute to managing change through fulfilling the motives of psychological ownership. For a feeling of ownership and successful implementation it is essential for the practitioners to know, understand and be familiar with the strategy (Luoma 2014, 150). My findings correspondingly tell of the proactive, successful agency of management assistants, the ownership of strategy, planning, organizing and facilitating the implementation operations in their organisations within the framework of the strategy and through trust and cooperative relationships with their formal superiors. Still, mainstream strategic management research treats strategy as a managerial issue and the practitioners' activities as operational, and fails to understand the potential of these critical strategic practices for successful implementation.

In strategic management there are still myths, taboos, biases and discrepancies hindering the development and use of the creative potential of practitioners (Knights & Morgan 1991; Mantere & Vaara 2008; Neuman 2002). According to my findings, I strongly argue that the solution is that we in both re-

search and practice open up and hand over the strategy to practitioners who are the experts of work in organisations. In the following chapters, I introduce more arguments to justify this claim. Along with globalization, the role of practitioners is little by little developing towards a *global actor* and *communicator* with means and channels to influence not only the organisation's working environment and interest groups, but also the macro societal contexts. Signs of this kind of development are seen in the empirical findings of the third essay on the role of practitioners in the strategy process in the international environment. In this development it is essential that the practitioners share a common understanding of the organisation's strategy in order to be able to act independently and efficiently according to the strategy.

4.7.4 Empowerment and engagement

Empowerment forms the premise of employee activity in strategy implementation. According to the Foucaultian idea, power exists in action interwoven in social relationships and linked to knowledge (Foucault 1977; Knights & Morgan 1991). Power is imperative to action but mere action is not sufficient for success as activity can at worst be negative and against the organisation's goals. Instead, committed *engagement* is needed. Empowerment, engagement and intrinsic motivation are closely intertwined (e.g. Thomas & Velthouse 1990) and deeply rooted in the perceptions of practitioners, and therefore, difficult to observe, assess and measure. In mainstream strategic management literature these feelings are often treated solely as unmeasured but sought outcomes of performance and have thus not been studied in depth as an elementary basis of successful strategy implementation. The managerial point of view has not been able to truly encounter the employees and their feelings in strategy processes. Research still lacks robust linkages and sustainable mechanisms between strategic planning and successful execution. My research attempts to understand and interpret these phenomena by looking at practitioners' perceptions from different angles and finding new literature to link a successful practitioner role in strategy implementation to concepts that organisational behaviour and psychology research have found as essential for employee activity at work, such as empowerment and engagement, and closely related concepts such as intrinsic motivation, self-determination and proactivity.

Engaged employees have become a strategic imperative and a key source of competitive advantage in organisations, as Shuck, Rocco and Albornoz (2011) also state. However, no one step is enough to create engaged employees. In this study, engaged and committed employee activities and perceptions were seen to be created via longitudinal processes of learning and cooperation. The realisation of the activity demands empowerment in the hierarchical structures of the organisation, preferably through approval and direct encouragement from the practitioner's own superior. Through narrative means it emerged that in addition to empowerment the successful mid-level practitioner also experienced great engagement and proactivity in their roles.

The context of strategy work has potential to increase work engagement through clarifying the organisation's purpose, goals and values, giving guidelines and direction and offering opportunities for coordinating and integrating human actions in cooperation. Therefore, strategy can increase the perceived meaningfulness of the work, which according to Bakker (2011) and Rosso et al. (2010), involves social interaction and sensemaking with co-workers, leaders and teams. However, the strategic work context does not always allow higher levels of autonomy, proactivity, job crafting and identity that have been found to increase engagement and the perceived meaningfulness of work (Bakker 2011; Rosso et al. 2010; Wrzesniewski et al. 2013).

The meaning of work for empowered and active mid-level practitioners in this study seems clearly to obtain a framework for understanding the strategy, as the practitioners express the strategy being 'behind all actions', the backbone of all work' and the 'be-all and end-all'. According to my findings, the identity of mid-level practitioners clearly grew from helping, supporting and facilitating the management and personnel to realise the mission and vision and to achieve the goals of the organisation. Respectively, Wrzesniewski et al. (2013) suggest that serving and helping others creates meaning and builds positive identity, and therefore, for practitioners in supporting roles, offers the potential to develop 'progressive organisational identity' – allowing practitioners to define themselves as evolving and growing towards a more desired self.

The concepts of empowerment, engagement as well as meaning and sensemaking in work are interlinked in the form of delicate human perceptions as the basis of the successful role and identity of a mid-level practitioner in strategy implementation. The core of role construction is in interaction, action and agency enabling knowledge-sharing and creation, learning and the common understanding of strategy. Revealing and supporting informal, implicit and tacit activities and cross-functional and cultural interaction enables building individual identities in social interaction and through these practices building organisational identity and knowledge assets for the organisation. Recognising and encouraging the practitioners' valuable absorptive, boundary-spanning, exploiting and explorative capabilities releases their potential for strategic renewal and building new knowledge and capabilities in the organisation. Through awareness, dialogue and encouragement it is possible to gradually build sustainable engagement and a positive organisational culture. Strategy can be the practical tool to make visible and empower successful practices. Figure 14 attempts to link these elements into a coherent whole.

FIGURE 14 Linking relevant elements of the successful role of a mid-level practitioner in strategy implementation

Constructing the process requires linking concepts and sets of concepts from different traditions of strategic management and organisational behaviour and psychology. The 'new' story is not really surprising or revolutionary, but rather *involves new attitudes and ways of working*. Hence, I attempt to show how the new working patterns can be planned and attitudes changed in order to make work easier and more successful. I first suggest how the managerial part of the construction can be enhanced. Then I describe the path to the new ways of strategy work enabling the practitioner's successful role and agency.

4.7.5 Managers as part of the construct

While the successful activities of mid-level practitioners in strategy implementation in the data here seemed to take more informal routes, the emerging managerial processes took rather traditional forms following Harvardian strategic management models based on top-down effectivity. In the structures of global concerns, the managerial top-down planning mode of strategic agency was self-evident even though more informal interaction with practitioners was involved through sensemaking on how to implement the strategy in local settings. The executives interviewed emphasised that they encouraged the personnel to take part in the strategic discussion. Still, the practitioners in general expressed a need for more support and interaction in order to understand the meaning of the strategy in their work. Concurrently, the most empowered practitioners

emphasised that their empowerment was due to good interaction and cooperation with their superior.

The strategic *dialogue* and relationship of trust between managers and employees still seems to lack patterns alongside the formal organisation channels. The efforts to bridge the gap between managers and practitioners lack an understanding of employee thinking and capabilities as well as the necessary frequency of interaction. In order to understand a successful strategy implementation the focus needs to be on the practitioners implementing the strategy, their perceptions, feelings of trust and assurance. Goleman claimed already in 1998 (Goleman 2004) that effective change leaders have *emotional intelligence,* which includes self-awareness, self-regulation, motivation, empathy, and social skills. Goleman further assures emotional intelligence can be learned through true commitment. In tandem with emotional intelligence, *social intelligence*, empathy, openness to learning and new ideas and a matching flexible or adaptive leadership style are helpful (Schoemaker et al. 2013; Yukl & Mahsud 2010). Employees appreciate the ethical reasoning and committed activities of managers (Jordan, Brown, Treviño & Finkelstein 2011).

The managerial point of view seems to grow from the thinking 'if you can't measure it you can't manage it'. However, for example, the dynamic, cooperative practices of mid-level practitioners when implementing strategy are not easily measured using traditional short-term economic and performance indicators. Zimmerman (2010) suggests managers should give up some measure of control and focus on *empowering actions* in order to cultivate a successful culture of improvement. Instead of attempting to plan and control, the 'perfect' strategy managers should, as Sull et al. (2015) also state, focus on the *adaption* capabilities of the organisation and support the employees' learning processes. Bakker and Schaufeli (2008) suggest, from the perspective of organisational psychology, focusing on *encouraging actions* and managing *human capital* rather than focusing on organisational structures, management control and economic principles. Parallel to encouraging and empowering, the AMO framework – enhancing employee abilities, motivations and opportunities to participate (Armstrong 2011, 10; Boxall & Purcell 2005, 5, 122) – can help managers see essential elements of human performance that need to be supported.

The challenge for managers is that interaction and cooperation are social activities involving a holistic approach – not only dictating but also respecting, listening and attempting to understand individual and contextual factors. Mutual mistrust can originate in many interlinked but rather trivial elements, for instance the language of strategy. As Laine and Vaara (2007) state, the top management are not always fully aware of the disempowering effects of their strategy discourse and the top-down control, which can increase tensions and concrete challenges from the point of view of the employee's right of self-determination and self-realisation. Managers should focus on discourses that promote participation such as self-actualisation, dialogization and concretization (Mantere & Vaara 2008). It is essential for managers to see how critically important role they play in building employee relations, creating trust, social

legitimacy for employees and supporting worker voice (Boxall & Purcell 2005, 144-170).

Along with management, *leadership* is also needed to encourage and support practitioners in successful strategy implementation. Yukl and Lepsinger (2005) propose, instead of polarising, a balanced combination of three approaches to leadership behaviour, improving efficiency and process reliability, improving human resources and relations and improving innovation and adaption. Rather than 'instrumental' management based on control and structuring, Nadler and Tushman (1990) call for 'charismatic' leadership built on *envisioning*, *enabling*, *empowering* and *energising*. Senge (1990 b) in turn does not encourage the use of the term 'charismatic leader' but instead talks about 'designers, teachers and stewards' enabling people to learn. Similarly, Binney and Williams (1995) call for leaders as facilitators; listening, respecting, encouraging, enabling change processes and learning while doing together. Empowering leadership increases the perceived intrinsic motivation, engagement and creativity of employees (Zhang & Bartol 2010), and through such socio-cognitive factors, also performance (Cerasoli, Nicklin & Ford 2014; Dirks & Ferrin 2002). Leaders can enhance worker empowerment, engagement and well-being by providing appropriate resources and creating the right working conditions for them through processes of influence and interaction (Tuckey, Bakker & Dollard 2012).

Closely related to Nadler and Tushman's (1990) charismatic leadership and similarly applicable forms of leadership in the strategy process is the *transformational leadership,* started by Burns 1978 (Dvir et al. 2002; Yukl 1999), emphasising cooperation, respect and equality between leaders and followers or subordinates in the case of business organisations, and leadership characteristics such as motivating by providing meaning and stimulating creativity and empowerment through encouragement. Transformational leadership is related to higher effectiveness and better performance as well as psychological empowerment, organisational commitment and trust (Avolio, Zhu, Koh & Bhatia 2004; Bartram & Casimir 2007; Dirks & Ferrin 2002; Lowe, Kroeck & Sivasubramaniam 1996), but has also been criticised for too little empirical research (Avolio et al. 2004; Yukl 1999). Measuring these positive outcomes is challenging because of the multidimensional and overlapping nature of both personal and contextual variables having also a reciprocal effect as, for example, Dirks and Ferrin (2002) state.

There is still much to do both for researchers and managers in order to see employees as independently thinking and acting *subjects* instead of objects for managerial actions. Success begins with *believing in people's potential*, and finding sustainable ways to enable and encourage practitioners' creative learning processes. New ways of working demand of the traditional managerial point of view accepting a more enabling, creative and thus, 'chaotic' way of working instead of control, order and predictability. The sharp edge of this argument comes from some revealing examples in the data:

1) In organisation 10, the interviewed area manager in the Finnish subsidiary declared that the communications department was responsible for the strategic communications in the organisation and the assistants did not deal at all with strategic communication, whereas in the same organisation the head of the support office said that the informal strategic communication was the assistants' task and responsibility.
2) In organisation 7, the management assistant described her proactive communication processes in strategic cooperation with the headquarters in Europe, the subsidiary and the area offices in Finland when making sense of the global strategy and creating the local strategy in cooperation between the units. When I then asked her to draw her network of communications she was not able to describe the 'informal' cooperation but insisted on expressing the interaction at the level of the hierarchical relationships – between superiors and managers as it formally was – this, even though the interaction in practice was realised at the practitioner level and the research treats her contribution anonymously.
3) In organisation 3, one of the interviewed managers doubted the assistant's ability to understand strategic matters. The interview with the assistant, however, showed clearly that the assistant had an understanding, capabilities and great potential to deal with strategic practices in the organisation.

Based on my findings and the reviewed literature underlining cooperation, respect, trust and belief in the employees' potential, I suggest that managers should pay more attention to *developing the daily interaction* in order to enhance understanding between managers and employees. The first step in larger organisations can be improving the dialogue with mid-level practitioners who can then also implement more open practices at the grassroots level and the periphery of the organisation.

I presume that the alternative to top-down procedures need not be bottom-up, but rather a golden mean enabling better interaction and cooperation between management and employees. I argue that the challenges to building trust, true cooperation and change are deeply rooted in the attitudes of managerial planning and employees executing practices. The real challenges concern the adaption of the organisation to change. Respectively, managers are often concerned about the problems of managing the practitioners' multilevel organisational activities. According to the evidence from the engaged mid-level practitioners' narratives in the data and my longitudinal experience with these practitioners, I suggest that managers are concerned in vain. If managers focus more on enabling and encouraging practices rather than controlling and measuring activities, they can contribute to practitioner engagement in their tasks and a more aware, empowered and independent professional identity as well as adaptive and creative capabilities. Consistently, Salanova and Schaufeli (2008) suggest focusing on contextual factors in order to impact proactive behaviour

through work engagement. Furthermore, Ryan and Deci (2000) found that supporting people's basic social needs such as autonomy, competence and relatedness increases people's natural activity and engagement, whereas excessive control, non-optimal challenges and lack of connectedness can lead to lack of initiative and responsibility or even distress or alienation.

Empowered practitioners, sensing their own professional identity need not ask for advice and reassurance every day and they can also creatively develop the working processes in the whole organisation as they know the organisation, its capabilities and potential better than the executives. As Gabarro and Kotter wrote in 1980 (Gabarro & Kotter 2005) about *managing your boss*, the other way around *managing your employees* means mutual respect and understanding our own and the counterparts' strengths, weaknesses, goals, working styles and needs. It is not about passively assuming you know what the employees expect but to find out through discussion.

4.7.6 Towards a new approach to strategy work

The *traditional* strategy work starts with the top management and is based on managerial actions. For the employee, enablers come from the *macro level* knowledge of strategy delivered vertically through the hierarchical communication channels of the organisation. The strategic information is explicit and formal, and often remains remote for the individual employee. Normative strategic management literature advises managers to focus on clear goal setting, monitoring, controlling and measuring employee performance. The mainstream literature emphasises the importance of strategic planning, the formulation of the contents of the strategy and underlines external and economic factors.

In addition to performance and cost, organisations have not been interested in more employee focus than staff turnover, absences and satisfaction. Employee practices consist of implementing the strategy and mid-level practitioners support these activities, more or less aware of the strategic nature of their actions. At the social level, the processes, rules, patterns and division of labour are essential. The results that are pursued at organisational macro level focus on economic outcomes. The traditional strategy work focusing on the explicit macro level of the organisation is presented in Table 8.

TABLE 8 The traditional approach to strategy work

Approach to strategy work	**Traditional**
Level	Macro, explicit
Enablers	Knowledge of macro level strategy
Employee perspective	Cost, performance, turnover, absence, satisfaction
Individual agency	Receiving strategic knowledge and implementing the strategy
Social agency	Processes, rules, patterns, division of labour
Results	Economic outcome

Moving to the *micro level* makes it possible to see the employee as an individual with potential that can be encouraged and supported in order to enhance the employee's professional identity and commitment. The mid-level practitioners can conduct independent strategic practices of communicating the strategy, organizing, coordinating, integrating and facilitating. In these activities, the relationships between managers and practitioners are essential, as well as sensegiving and sensemaking in terms of the meaning of the strategy for individual practitioners. At the social level, knowledge sharing and learning become critical informally and horisontally. Achieving the strategic goals can be encouraged, supported and monitored at the individual level. The *dialogical* elements of the strategy work are presented in Table 9.

TABLE 9 Dialogical strategy work at the explicit and implicit micro level

Approach to strategy work	**Dialogical strategy work**
Level	Micro, explicit, implicit
Enablers	Managerial encouragement, support and belief in employees' potential Understanding what strategy means to one's own work
Employee perspective	Engagement Awareness Meaningfulness Strategic competence and capabilities
Individual agency	Independent strategic practices, communicating the strategy, organizing, coordinating, integrating, facilitating
Social agency	Knowledge-sharing, learning, helping, common understanding
Results	Achieving individual strategic goals Economic outcome

Descending to the even deeper *implicit and tacit levels* makes it possible to be aware of the individual's strategic position in the social network of the organisation. This position based on cooperation, trust and intrinsic motivation involves treating practitioners as independent and capable *subjects* instead of objects of managerial actions. In this kind of context the practitioners can create a *strategic practitioner identity*. The practices that become mundane are organic learning, creating knowledge and value for the organisation's strategic competitive edge. Creating knowledge, implicit and explicit, formal and informal as well as individual and organisational, occurs in complex processes of organic learning (Small & Sage 2005/2006), requiring an encouraging and enabling environment. Organic learning and creating knowledge in cooperation can in turn provide organisational value through sustainable engagement as Pitelis (2009) suggests. Building engagement is worthwhile because it improves not only the results of the organisation but also the overall working culture (Bakker & Schaufeli 2008). Especially in the context of uncertainty and change, the pursuit of adaptive and proactive actions and learning are ways through which organisations can succeed sustainably. At the organisational level, the activities are based on dynamic, proactive systems rather than old control-based structures, seeing organisations as living systems that build on respect and awareness of people's potential, reflection, learning and change (Binney & Williams 1995; Schoemaker et al. 2013), involving, as Ståhle and Åberg

(2015) put it, 'good order' through abundant interaction, open communication and self-organisation. These proactive systems can furthermore be described using SHRM constructs of high involvement or high performance working systems (HIWS or HPWS) with an open, creative, people-centred and inclusive working culture, action through people, flexible working, empowerment, loyalty and investment in training (Armitage & Keeble-Allen 2007; Armstrong 2011, 156). These working systems can create a positive culture in the organisation, higher degrees of job satisfaction, positively influenced working design and improved communication processes in the organisation (Armstrong 2011, 160; Varma, Beatty, Schneier & Ulrich 1999). In order to create a HIWS or HPWS, Armstrong (2011, 162-167) recommends creating a high performance strategy aligned to the business strategy on how to achieve the goals of the organisation and create and maintain a high performance culture based on an understanding of what the people's contribution can be.

The suggested new level strategy work is presented in Table 10.

TABLE 10 New approach to strategy work at the implicit and tacit micro level.

Approach to strategy work	**New way of strategy work**
Level	Micro, implicit, tacit
Enablers	Strategic position in the social network of the organisation
Employee perspective	Trust Intrinsic motivation Independent and capable subjects with strategic identity
Individual and social agency	Organic learning Creating knowledge and value Strategic communication Sustainable engagement
Results	Sustainable success Individual and social experience of success Economic outcome

Accepting and encouraging these elementary levels of human agency and building trust in work contexts facilitate the practitioners' strategic activities and communication and being sustainably engaged in their strategic roles. The results of this new way of seeing strategy work and the practitioners' roles, enables a sustainable individual and social experience of success, as well as organisational success in strategy implementation. This success is not saliently dependent on market environments or external competence factors because the employees are ready to adjust to changes and act proactively according to the organization's goals in its environment.

5 CONCLUSIONS AND EVALUATION OF THE STUDY

This research attempted to establish what constitutes the successful role of employees, in particular mid-level practitioners, in strategic processes and in particular in strategy implementation. I demonstrated the role through practitioners' practices, activities and perceptions in the social environment in the strategic processes of 14 organisations.

Adopting an approach based on constructivist development made the practitioners' communicative, coordinating, organizing and facilitating practices and potential to enhance organisational sensemaking, learning and knowledge creating processes visible. Moreover, studying the practitioners' narratives made it possible to increase the micro-level understanding and interpretation of the practitioners' socially embedded tacit practices, and to find creative solutions to the challenges of strategy implementation. These practices were found to be especially fruitful in the international environment. The narrative approach revealed the practitioners' valuable and not easily imitable capabilities (Barney 1991), such as absorptive (Cohen & Levinthal 1990), boundary-spanning (Pappas & Wooldridge 2002; 2007), coordinating (Grant 1991, 1996), exploiting and exploring (March 1991) capabilities. From the managerial point of view the challenge is to identify the potential and encourage, enable and support these processes, rather than seek to control and measure them from the top down. The research makes visible the paths for building sustainably successful implementation practices in organisations.

The findings contribute to the understanding of how to constitute sustainable success in organisational strategy processes and strategy implementation. Moreover, the findings are important for researchers that interpret the meanings, perceptions and activities of practitioners in the work context, and for understanding the highly embedded social practices in strategy implementation. Furthermore, the research gives voice to the often neglected mid-level practitioners in supporting roles as experts of work and implementing strategy in the manager oriented strategy processes in research and practice.

This research attempted to answer several calls for research. In strategic management research there is a longitudinal need to understand the employee's point of view in strategy process and implementation, while research has mainly concentrated on strategic planning and decision-making, managerial actions and the content of strategy and implementation has been the Achilles' heel of the research of strategic management (Beer & Nohria 2000; Hrebiniak 2006). Existing literature on employee roles in the strategy processes is scarce and fragmented. Research on strategy processes has neglected the psychological and social dimensions and the deeply embedded tacit knowledge of organisational routines (Kriger 2005) as well as how practices are embedded in broader societal or macro-institutional contexts (Vaara & Whittington 2012). Human actors and their actions, emotions and motivation have been absent from most strategy theories (Jarzabkowski & Spee 2009), and the strategic actions in the periphery of the organisations have been understated (Mantere 2003). Research and practice do not capture the real challenges of strategy implementation such as cross-functional coordination, agency at all levels of the organisation, truly interactive communication, cooperation and creative solutions in an encouraging organisation culture (Sull, Homkes & Sull 2015). I have attempted to answer these calls, addressing the less attractive but more challenging topic in strategic management research of the employee's role and perceptions in the complex social contexts of strategy implementation, which have almost not been studied in a qualitative manner at all, perhaps due to employees not being thought of as active actors or their activities as strategic.

Furthermore, the study attempts to answer calls to bridge the research on strategy and organisation to (Floyd et al. 2011; Gavetti & Levinthal 2004; Mahoney & McGahan 2007) and through a more integrative approach in order to better understand the activities, practices, processes and perceptions of people at the micro level in strategy processes (Kriger 2005; Vaara & Whittington 2012; Whittington et al. 2006).

5.1 Contributions to theory

The research contributes to the literature in the field of *strategic management* in several ways. First and foremost, the research increases our understanding of the roles and practices of employees, in particular mid-level practitioners in successful strategy implementation processes. The empirical research is valuable because research on the role of employees is scarce in strategic management literature. The research on strategy implementation has similarly been less attractive in the field even though it is the biggest challenge in strategy work. Specifically, the study develops the ideas of *Strategy-as-practice* research, focusing on the practice-based micro-level agency of practitioners in strategy contexts. This research extends the findings of the Strada project at Aalto University 2000–2011 concerning strategy implementation in Finnish organisations, ex-

amining the roles, practices and perceptions of mid-level practitioners more deeply.

This study examines the roles of practitioners in real life strategy contexts to understand successful strategy implementation. Through the phenomenological constructivist approach, the black box of mid-level practitioners' informal, implicit and tacit agency in strategy implementation is opened up and examined in detail. With the help of a positive paradigm view, valuable and not easily imitable practices are revealed in order to benefit strategy implementation practices. The socially rooted practices such as interactive communication, organizing, coordinating, integrating and facilitating are elucidated in the social contexts of the strategy implementation activities of global organisations.

The latest discussions in strategic management research have been concerned with the major role of *middle manager*s in the strategy process. The current study adds the strategic role of other mid-level practitioners, such as assistants, experts and officers, to this discussion. Especially interesting is the discussion of the middle manager's *boundary-spanning* role (Pappas & Wooldridge 2007). The study extends to this knowledge showing how the mid-level practitioners can have similar or even more powerful boundary-spanning roles between the units of global companies, sharing and creating strategic knowledge and mastering these social relationships and networks in order to coordinate the subunits' efforts according to the headquarters' strategy.

The study adds to the body of knowledge of the *resource-based view* revealing potential of the capabilities of mid-level practitioners in successful strategy implementation, which had previously been insufficiently recognised. In particular, the research contributes to our understanding of how complex dynamic relationships and interaction can constitute valuable capabilities, as Barney (1991; 2001) discusses. Since the pioneering article by March (1991), research has been interested in the *ambidexterity* of balancing between the *exploration* and *exploitation* of resources. This study recognises both the explorative and exploitative capabilities of mid-level practitioners coordinating and integrating strategic knowledge cross-functionally and culturally, increasing not solely the common understanding of strategy but also the creative potential of employees as well as new ways of working.

Moreover, the research contributes to the *knowledge-based view* increasing our understanding of the knowledge coordinating and creating practices of the mid-level practitioner, as well as their facilitating of learning processes in strategy implementation in organisations. These practices are made visible applying for example the conceptual models of knowledge creation by Nonaka et al. (1991; 1994; 2003) and Dalkir (2011). The study suggests that mid-level practitioners are outstanding strategic communicators and facilitators of strategy processes in organisations, especially at the informal level and in the global environment. The practitioners play an important role in formulating local strategy according to global strategic guidelines, aligning the knowledge of the local organisation and market demands in frequent and systematic knowledge-sharing between the units and levels of the organisation.

The research contributes to both strategic management research and organisational traditions making an attempt to link together matching concepts, such as extra role behaviors, high performance working systems and leadership practices. Both research traditions benefit from the bridging of constructs as also Floyd et al. (2011) and Mahoney and McGahan (2007) state.

5.2 Practical implications

The practical implications of the research are eminent while managers and organisations are struggling with the challenges of strategy implementation and engaging employees. The research offers positive and creative solutions to solve strategy implementation problems in organisations and to gradually build new and successful approaches to strategy work. The empirical focus is on the realities of strategy implementation practices in different kinds of organisations, small and large, private and municipal, manufacturing and sales, global and local. The findings suggest that practitioners have more strategic capabilities and potential than previously thought. The capabilities were identified as those that are especially useful in successful strategy implementation, such as communicating, coordinating, organizing and facilitating. Mid-level practitioners have a strategic position and practical, dynamic, proactive and boundary-spanning skills that can be used to enable organisational learning and adaption to change, and a common understanding of and commitment to the goals and means to succeed.

The research shows both visually and describes in detail how these capabilities can be built and nourished in working contexts. For managers and practitioners the implication is an awareness of the potential of relevant and realistic capabilities that can be deployed to develop strategy implementation in organisations. Crucial to this is to believe in people's potential as independent and capable subjects with a strategic identity. In order to encourage and empower the practitioners, it is essential for managers to also understand the major role of informal interaction and cooperation in these processes. Practitioners need to know the strategy but also the organisation as well as have the empowerment to act within the scope of relevant networks. Adapting new strategies, learning new ways of working in the organisation and creating unit-specific knowledge demands sensemaking, knowledge sharing as well as time and forums for these processes. Managers are recommended to improve their participative leadership skills of enabling, empowering and encouraging instead of the traditional control-based working methods.

The construction of successful roles for mid-level practitioners provides ideas for both practitioners and managers on how the roles of practitioners, sustainable engagement and professional identity can be enhanced in the strategy context. The core of the 'success receipt' is building trust, engagement and a positive organisational culture through interaction and action. Strategy can be

the practical tool to allow practitioners to make sense of, plan and master their work and make the knowledge-sharing and creating processes visible in strategy implementation.

Managers and superiors are offered practical models to develop a cooperative working culture in their organisations. Moving forward from traditional ways of working demands dialogue and sensemaking in regard to what the strategy means at the individual level in practice. In order to enable sustainable success means accepting and encouraging elementary levels of human agency, building trust, intrinsic motivation and sustainable engagement in the networks of the organisation. The research recommends opening up strategy in organisations and using it as a tool to build the strategic role and identity of practitioners as well as to create more successful approaches to strategy work and implementation.

5.3 Evaluation of the study

I evaluate the research first using criteria from Silverman (2001, 219-254) for *qualitative* research and then criteria for Charmaz (2006, 182-183) for *constructivist grounded theory*.

The *reliability* of the research was enhanced through several means. First, the research started as a comprehensive cooperative project providing the opportunity to cooperate with colleagues and to gain a wider perspective on the studied phenomenon through more cases and surveys reaching thousands of practitioners. Moreover, Van de Ven's (2007; 2011) engaged scholarship was applied during the whole research project enabling cooperation with both practitioners and researchers. The cases and participants for finalizing the grounded theory were both carefully and theoretically selected with clearly expressed criteria about the practitioner's successful role in strategy work. The qualitative longitudinal co-creation with the participants was useful for theory creation but narrows down the number of participant roles that can be studied profoundly within the scope of one single thesis. Second, studying the phenomenon openmindedly from different angles in real-life contexts through both interviewing and observing decreased the threat of stagnating into overly narrow explanations. Third, reliability was enhanced through the researchers' longitudinal professional interest in the studied phenomena. The findings and theory constructions in all phases of the research process were presented at several Finnish and international seminars and workshops, and reviewed blind by seminar arrangers. All comments obtained were carefully studied and taken account of. Fourth, the research was grounded in strategic management research and even though the last phases of the grounded theory process are based on creative subjective thinking, the emerging theory was comprehensively compared with research findings in the field. Furthermore, current and relevant perspectives were utilised within the fields of organisational psychology, leadership and strategic

HRM. It is clear, however, that within the scope of one thesis this examination cannot be comprehensive.

From the *methodological* perspective, the philosophical standpoints were clarified and several complementary, applicable and standardized methods were precisely and systematically used. Longitudinal action research was experienced as especially revealing in order to understand the dimensions of the phenomenon in the practitioners' everyday realities. As Silverman (2001, 232-233) states, people do not always answer interview questions in a manner that reflects how they behave in naturally occurring situations because the interview is also a social situation, where the impact of the social roles of the practitioners and researchers as well as the set-up can affect the answers. Versatile categorising and creative reorganizing of the data in an abductive grounded theory process made new understanding of the practitioners' practices and perceptions possible at deeper levels as well as opening up the audit trail for the research. Rewriting the narratives helped synthesise the essential elements of the practitioners' realities into coherent theoretical constructions at organisational and wider social levels.

Qualitative *validity* – seeking to find the 'truth' about the phenomenon (Silverman 2001, 232, quoting Hammersley 1990) – was enhanced by focusing strictly on the research question, not delimiting the focus with frameworks decided in advance and through listening wholeheartedly to the practitioners' emic stories and expressions, documenting the findings thoroughly, and also discussing the memos and narratives afterwards with the participants diminished the risk of misunderstanding the practitioners' real meaning.

The criteria used by Charmaz (2006, 182-183) for constructivist grounded theory emphasise credibility, originality, resonance and usefulness. Regarding *credibility* Charmaz mentions intimate familiarity with the setting or topic and the sufficiency of the data. In my research the topic concerns not only my research ambitions but also my professional interests, my work as a teacher, thesis supervisor and project manager, my students' learning objectives and successful employment when graduated as well as practitioners' knowledge and successful performance in practice. Hence, it can be argued that the topic for me is both familiar and relevant and the contacts diverse. An eventual disadvantage can be that a researcher gets too tied to a topic that concerns one's own work. I do not see this as a risk because it is only one, even though an essential, element of my professional experience and focus. Actually, the risk can be even higher when the researcher is professional and living depends on publishing and grants. In my case an obvious drawback is that I am not a professional researcher, but on the other hand I hope my work manifests the sincerity of studying a topic that is important in practice but not very popular in research.

Charmaz calls for systematic comparisons between observations and categories. In my work, the data and the categories were studied from different angles in five essays, and additionally, as part of the final phases of grounded theory analysis. The categories were comprehensive and rich with details from real-life practices, processes and experiences. In the grounded theory process, the

studied elements were compiled to form a coherent and logical whole in order to benefit the research and the practice. The mid-level practitioners' stories provide comprehensive evidence for assessing and constructing the studied phenomenon, also give the reader an opportunity to form an independent assessment and agree with the claims. Doubtless, descriptions of the cases and the strategy processes in the organisations could have been more comprehensive in order to show differences in different kinds of contexts. However, during the preliminary work I already made the observation that the context was not that relevant when studying the practitioners' roles, and the strategy processes were surprisingly similar in different kinds of organisations. This is why in this thesis I wanted to concentrate on practitioners' perceptions, practices and activities instead of the contexts.

The originality means fresh categories and an analysis offering new insights and conceptual interpretations of the data. The first categories more or less follow the mainstream literature, but the more knowledge I obtained from the field and the literature, the fresher the perspectives and interpretations I could use when examining the data. A disadvantage is that the details of the daily work of the employees are not very 'exiting'. Often the reaction to these kinds of results can be that they do not provide any novelty; for example, the major role of interaction may seem a trite result, as the lack of it is a common problem. However, more important than making this conclusion is making visible *how* the interaction and employee's strategic identity can be enhanced. The originality is also about the social and theoretical *significance* of the work. I believe the topic itself, looking at strategy processes from the employee's point of view, is novel and important in the field of strategic management, considering that strategy implementation is the greatest challenge in strategic management. The subject is also current and relevant for managerially oriented strategy processes in practice. During my research project, the theme has gradually become more evident in strategic management research and organisational practices at least in European research and in Nordic organisations.

Charmaz, when using the term *resonance,* is referring to how the categories portray the fullness of the studied experience, how the research reveals taken-for-granted meanings, draws links between larger collectivities and individual lives and makes sense of the research for the participants. I believe the tables, figures and descriptions of my data portray the successful role and practices of mid-level practitioners in a way that makes theoretical and practical sense. The constructed theory was found useful and relevant, increasing the awareness of both managers and practitioners of how strategy work and the role and identity of the practitioners in it can be enhanced. The research also reveals taken-for-granted activities that the mid-level practitioners, often female, perform in supporting functions. I believe these insights can make the practitioners' work more visible and little by little change the lived reality so it becomes a more positive cooperation between the managers and practitioners working toward common objectives. I have discussed my findings with the practitioners, with

my students and colleagues as well as with other researchers in the field and received convincing and gratifying resonance to my claims.

Last but not least, in the constructivist spirit, it is essential that the research proves *useful*. Usefulness is increased in addition to the relevance and reliability, through the applicability of the results and the theoretical constructs. During the research process, I have already experienced that the awareness of the practitioners' strategic potential can benefit the practitioners themselves as well as the students through increasing the usefulness of understanding the strategy and through building confidence in their own capabilities. Similarly, an awareness of the practitioners' strategic practices and skills is eye-opening for the managers. In terms of theoretical usefulness, I have grounded the results and theory construction in strategic management research in the organisational tradition. The results are examined at micro, meta and macro as well as explicit, implicit and tacit levels, and can therefore be generalised to different kinds of practitioners, organisational working contexts and strategy processes in order to build sustainable individual, social and organisational success. More research is undoubtedly needed on the practitioners' roles using different methods and in different cultures and contexts in order to make reliable generalisations. I also suggest that there are new directions for further research believing that my research generates new ideas and demands for research to contribute to 'making a better world'; that is, sustainably more successful working contexts.

My own learning process commenced on the basis of a traditional functional paradigm, proceeding towards deeper levels of understanding of the employees' everyday perceptions and practices in the strategy process, and finally, arriving at a more interpretive position. Through the increased understanding, my thinking evolved in more radical directions and I began to understand that as long as strategy is treated as a manager's 'toy' and priority, it cannot become an employee's tool towards successful strategy implementation. If the strategy is not shared it is worthless to seek employee engagement and empowerment. I started the research with a functional aspiration of respecting the organisational structures and goals, without seeking a revolution in the spirit of radical structuralism. Still, I believe in the organisations' basic structures; managers need to be responsible for their tasks and employees for theirs, but a new awareness is needed in order to enable the creative potential of practitioners in successful strategy implementation.

My personal motivation for this research was to better understand the practitioners' successful implementation practices in strategy processes and find ways how to develop them. During this research process I have garnered a lot more understanding on these phenomena and continuously keep learning more. In my work with students and practitioners I have been able to apply this knowledge and see on daily basis how encouraging people liberates creativity, engagement and skills that have been hiding. I trust believing in people's potential can solve the problem of strategy implementation.

5.4 Limitations and ideas for future research

During the research process I experienced my inadequacy as frustrating; there is so much research globally that it is impossible to take into consideration all relevant aspects. Nevertheless, I understand this is not the duty of a single researcher either. I have narrowed down the research question in an abductive process, attempting to navigate between the demands of research and practice in order to conduct rigorous and relevant research, as Mohrman and Lawler (2011) and Van de Ven (2011) suggest. Even though I feel I have succeeded rather well in this endeavour, there are several limitations in my work.

The research only captures a small, albeit a relevant, group of mid-level practitioners primarily in Finnish work contexts partly in global organisations. Focusing on the successful implementation of strategy instead of also planning the strategy leaves out many interesting perspectives; for example, the practitioners' contribution to strategy formulation in local, informal and cross-functional contexts. This focusing allowed me to find applicable solutions grounded in relevant theoretical frameworks to the largest strategic management challenges; however, more empirical research, and quantitative research in particular, is needed in order to take in cultures, organisations and practitioners from a wider range of contexts.

Even though there is plenty of literature into strategic processes and practices and organisational performance, the research on the roles and agency of practitioners in strategy processes is scarce and fragmented, even in the field of S-as-P in respect to practitioners as strategic actors. Hence, my study is on somewhat pioneering ground searching for a foothold. On the other hand, the missing grounded standpoint has increased my creative potential to examine the phenomena more open-mindedly and find more unexpected solutions. However, the perspectives of RBV, KBV, sensemaking and research on middle-manager agency in the more traditional strategy research as well as S-as-P and process perspectives have offered several relevant standpoints to ground my research upon. The organisational traditions in addition have broadened my options for examining and interpreting the practitioner perspective in the implementation processes.

Because of the delimitations that needed to be done in order to ground the research in the field of strategic management, the linkages to relevant streams of research, such as leadership, organisational psychology and strategic human resource management remain narrow. Hence, in my next endeavours I would like to address these linkages more profoundly. Furthermore, I call for more research combining the fields in order to find solutions to the problem of strategy implementation and the role of employees in it, joining several scholars all suggesting the cross-fertilisation of the fields of organisational research.

In the field of strategic management, this thesis provides a minor contribution, although for me, it is a massive contribution in the study of the successful roles of practitioners in strategy processes. Hence, I continue my research and

moreover wish to suggest some new avenues for future research more generally. To start with, the successful practices and agency of practitioners in strategy processes can be studied on a larger scale including more informants in wider contexts globally in order to create a whole body of strategic architecture and change agency at the middle level of organisations or from the perspective of supporting functions.

The practitioners' strategic role and identity could be studied in longitudinal constructivist contexts in order to develop the roles and capabilities, and therefore, find generalisable understandings in this from the rather novel perspective of managers, practitioners and strategic researchers. Practice could be studied in more detail focusing for example on the knowledge creation processes in strategy workshops, especially in cross-cultural cooperation. Moreover, the potential for knowledge-sharing and creation could be studied in informal settings, for example, in functional communities of practice with middle managers, assistants or specialists. New and interesting positive trends in organisational behaviour and psychology such as engagement and 'thriving' at work could also be utilised to a larger extent in the field of strategic management in order to unravel in a robust way the problem of strategy implementation and the sustainable success of organisations.

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APPENDIX 1

TABLE 11 Research process

Practice	Research problem: Strategy implementation fails	The strategy processes and practices, factors enhancing positive employee roles and ways of working	Implementation of a strategic project in sales and service context in one case organisation	Mid-level practitioners' roles in strategy processes, middle managers, management assistants, HR and communications officers		The big picture Understanding the essential linkages and relationships
Empirical actions	Starting and leading multi-methodological cooperative RandD project with ca. 20 cases interviewing practitioners, development projects in organisations, studying barometers, current economic news etc.	Exploring employees' practices, actions, perceived roles in strategy processes	Participating in the work in one case organisation and in implementing a strategic project in cooperation with the practitioners, observations with ethnographic intent	Conducting narrative interviews of mid-level practitioners		Studying how to interpret and develop working-life practices in strategy work
Abductive reasoning	The employees' part in the implementation process is not clear, strategic management fails to solve the problem in practice and in theory, there is not much research taking account of the employees' role in the processes	Different forms of interaction seem to be most essential for employees to have an active and empowered role in strategy processes	Level of interaction and engagement are high among practitioners, but the implementation as planned fails because of problems in cooperation, communication and leadership	The mid-level practitioners' role and empowerment as part of the successful strategy implementation and strategic communication, the role constitutes of different forms of action and interaction		The mid-level practitioner's role can be constructed combining concepts of action and interaction in knowledge creating processes
Studied literature	Strategic management Leadership Organisational behaviour	S-as-P Learning Cultural Organisation psychology	Strategic marketing, sales management Action research	S-as-P Related organisational literature		Integrating the different traditions
Applied methods	Multiple-case study Open-ended interviews Action research Inductive reasoning	Multiple-case study Open-ended interviews Inductive reasoning	Longitudinal participative action research	Narrative inquiry		Inductive, GT analysis Interpretative hermeneutic reasoning
Theoretical base	Traditional strategic management	Practice, action, knowledge, resource based views	Activity	Practice Power		Resource, knowledge, agency based views
Phases of research	Pre-idea and pre-work Understanding the phenomenon, formulating research questions, searching for the big picture, "the forest"	Focused research question, dissertation plan, Inductive exploration	"Testing" the ideas in practice	Studying "the trees": Detailed research on practitioners' practices and perceptions in strategy processes		Synthesis, integrating the concepts and constructs from literature and data to a holistic theoretical construction

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THE ESSAYS

The phenomenon of practitioner's role in successful strategy implementation was studied in five essays from slightly different angles. While the essays mainly seek a big picture understanding of the phenomenon, the grounded theory process in the main dissertation report delves deeper in the practitioner's successful practices. The essays had an important role in my research process for gradually increasing my understanding of the essential elements of this large and complex phenomenon in theory and practice. Rather than final results, the essays in this digital report show the path of reasoning towards the emerging grounded theory construction in the main dissertation report. This digital essay report aims to give a coherent enough picture of the studied phenomenon and emerging theory but the presentation is shortened from the original versions because the essays share same ontological and epistemological assumptions, research gap and definitions of the central concepts. However, it was not possible to avoid repetition entirely in order not to cause gaps in the logic of the essays.

The essay titles and research questions are compiled in Table 1.

TABLE 1 The essays and the research questions

Essay title	Research Question
1. Employee's role in strategic change	How is employee's role perceived in strategic change and how could employees play a more active, empowered and engaged role in dealing with strategic changes?
2. Identifying factors related to employee's engagement in strategy implementation	What kinds of factors are perceived as enhancing the employees' engagement in strategy implementation?
3. Middle-level practitioner's role in strategy process in international environment	How is middle-level practitioner's role perceived in organisation's strategy process in international environment?
4. Developing strategy implementation and employees' engagement in cross-functional cooperation in Sales and Service - Action Research in a Multinational Headquarters	How can the implementation of a strategic cross-functional cooperation project and the employees' engagement in it be improved?
5. Middle-level practitioner's role and empowerment in strategy process and implementation	How is middle-level practitioners' role and empowerment in strategy processes constructed in different kinds of organisations?

I

EMPLOYEE'S ROLE IN STRATEGIC CHANGE

by

Eija Kärnä, 2015

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1 EMPLOYEE'S ROLE IN STRATEGIC CHANGE

ABSTRACT

This essay explores how employees perceive their roles when encountering and implementing strategy. The empirical data consist of semi-structured interviews in six different kinds of organisations to gain comprehensive understanding of how in particular middle-level practitioners such as middle managers, management assistants and officers perceive their role in strategy process and what kinds of factors they experience as enhancing their activity, empowerment and engagement in strategic change. The essay compiles factors that make it possible for the employees to play an active role in strategy process and implementation. Results suggest that employees have great potential improving their contribution in the rather traditional top-down strategy processes, but they need knowledge-sharing and support from their superiors. By empowering middle-level practitioners it is possible to enhance their engagement, possibility to plan their work and adapt to strategic change, and thus improve strategy implementation and performance in organisations. A holistic model combining the results from empirical data and literature maps the essential elements of employee's perceived role in strategic change.

Keywords: Employee's role, strategic change, strategy process

1.1 Introduction

Strategic change means inevitably change also for employees. Employees need to understand what the strategy means in practice for their everyday work. The traditional one-way communicating of strategy is not enough to build individual and group level understanding. Communicating strategies and implementing them in globalizing and reorganising organisations is a challenge. Even though implementing strategic change considers mainly employees, the traditions of both strategic and change management have treated change largely as a managerial issue. In rapidly changing environments, research is needed on *how* effective adaption is attained in change implementation in organisations (Mohrman & Lawler 2012).

Research on strategic management is mainly concerned with strategic initiative and performance in firms, managers and owners, environment, internal organisation and resources (Nag, Hamrick & Chen 2007). In the field of change management the focus has been on managers' actions and traits or linear change models of which perhaps the most influential has been Kotter's eight step model from 1995. Neither change management nor strategic management research have been interested in studying the employee's role in strategic change from the employees' point of view. Employees are seen as a resource but instead of understanding their engagement, the research has mainly been interested in the organisations' economic performance (Aaltonen 2007; Vaara & Whittington 2012) or managing this resource for example dealing with change resistance (Kotter & Schlesinger 2008). However, also Kotter (2012) points out that hierarchies, old methods and linear change processes, planned and implemented in beforehand determined order cannot handle rapid change and do not capture the employee's true perspective. The conventional approach to change neglects both the human potential in the processes (Sun 2009) and the human agency in a web of social practices (Vaara & Whittington 2012). The research has mist the most interesting change happening closest to the operations in messy, organic processes (Huy & Mintzberg 2003). It is obvious that a new view of research and micro perspective are needed to capture the employees' realities in strategic change believing in their creative potential (Carter, Clegg & Kornberger 2008; Johnson, Melin & Whittington 2003; Knights & Morgan 1991; Mantere & Vaara 2008; Neuman 2002).

In order to increase holistic understanding of employee's role in strategic change the essay aims to interpret the emic perceptions of employees, in particular middle-level practitioners, such as middle managers, assistants and officers, seen as having an important role in the implementation processes between the top-management and grass-root level.

The research question of this essay is: **How is employee's role perceived in strategic change and how can employees play a more active, empowered and engaged role in dealing with strategic changes?**

The paper proposes that 1). There can be found factors that employees' perceive enhancing their role in strategy work and implementation, 2). Managerial actions can empower employees in playing an active role in implementing strategic change, 3). Employees' activity and empowerment enhance their engagement and possibility to plan their own work. 4). Helping employees develop their role in strategy work enhances the organisational adaption of strategic change and the implementation of strategy and thus, organisational performance. The propositions are evaluated on the basis of the interviewees' expressed perceptions and discussed through the reviewed literature. The review is shortened from the original version limiting mainly to strategic change literature concerned of employees' roles. The main concept of the essay is *employee's role* in the context of *strategic change*, i.e. *strategy process and implementation. Activity, empowerment* and *engagement* are regarded as constituting an ideal employee's role and thus, studied as the pursued outcome of the research. The concepts are defined and discussed in the dissertation report.

1.2 Change and strategic change

Research on change is simultaneously separated and intertwined in different traditions of strategic management, change management and organisational change literature and thus, there is a multitude of definitions. According to By (2005) there is no consensus of a framework for organisational change management but there seems to be an agreement that the pace of change has never been greater than in current business environment, that change can be triggered by both internal or external factors and that it comes in all shapes, forms and sizes and affects all organisations in all industries. The literature behind different categorizing' is not always linked to change that is caused by implementing of a new strategy.

Strategic change can sees in Van de Ven and Poole's (1995) terms as *teleological*, i.e. as purposeful target-oriented cooperative development. According to Mintzberg and Westley (1992) strategic change can be divided into changes in the *content* of strategy and changes in the *organisation*. For employees it is important to understand what the content of strategy means to their own work but changes in the organisation concern people concrete by involving changes in their working culture, structure and systems. However, as Galbraith (1983) states most essential would be a good fit between these. Nadler and Tushman (1990) talk about *strategic organisational changes* having impact on the whole systems of organisations or redefine the organisations' basic frameworks including strategy, structure, processes and people, differing thus from *incremental* change that they define as 'continuous tuning and adaption in the organisation'. Strategic organisational change again can be divided to *re-orientation* being reactive and *re-creation* as anticipatory, planned and more

associated with success (Nadler & Tushman 1990). By (2005) in turn calls operational, ongoing changes 'continuous' and strategic change 'incremental'. These partly conflicting definitions reflect the complexity and extent of the phenomenon.

Huy and Mintzberg (2003) argue that effective and sustainable organisational change is a well-balanced rhythmical combination of three types of change: *dramatic*, descending from the top, *systematic,* generated laterally and *organic,* emerging from the grass-roots, and that change can be managed with a profound appreciation of this rhythm, and thus stability. Huy and Mintzberg (2003) warn of dramatic change without supporting systematic and organic change enhancing engagement, as well as of organic change without managerial and organisational support in order to avoid chaos. Instead, they suggest creating a *rhythm of change* where dramatic change can provide impetus, systematic change instill order, and organic change generate enthusiasm. As strategic change requires change also in the organisation, this research regards strategic change as parallel to organisational change.

1.2.1 Change as a process

Organisational change is a complex, multifaceted and holistic social process built on various cycles and demanding changes at all organisation levels and organisation culture (Hofstede, Neuijen, Ohayv & Sanders 1990; Mintzberg & Westley 1992; Schein 2010). Rapid technological change depends much on honing internal, technological, organisational, and managerial processes inside the firm (Teece, Pisano & Shuen 1997). Change involves employees being an ongoing dynamic process of activities in a series of phases of searching, doing, learning and modifying and bringing the strategy to life (Kotter 1995/2007). Furthermore, change comprises an ongoing non-linear interplay or a reconciliation of tension and energy and small changes at micro level in interconnected systems (Van de Ven & Poole 1995; Weick & Quinn 1999). Change processes require time and making mistakes or skipping steps in any of the phases can cause failure in the whole process (Kotter 1995/2007).

In strategic change a collaborative learning process of people is needed (Mintzberg 1990, 1998; Senge 1990a/2006; Schein 2010) and *inductive* learning as an informal and emergent process at all organisation levels (Mintzberg & Westley 1992). Learning can be adaptive coping or generative, and thus, creative (Senge 1990b). Learning processes demand several human elements linking together and influencing each other, such as awareness and sensibilities, beliefs and assumptions, relationships, skills and capabilities that enhance strategic thinking, learning and acting (Senge 1990a/2006). Social learning leads to shared basic assumptions of groups solving their problems and teaching the solutions to new members as the correct way of acting (Schein 2010) and thus build gradually the organisational culture. Organisation culture can mean problems when people cling to their habits and fear loss of power in hierarchies (Kotter 2012).

Competent *change management* is needed for success in hierarchies, projects, budget reviews and reporting as Kotter (2012) puts it but in strategy network *leadership* is essential meaning vision, opportunity, agility and inspired action. The social processes in organisations are not easily managed formally, but demand leadership support and energizing of people as well as social skills from managers to lead change effectively in organisational networks (Goleman 1998). Through empowering group dynamics it is possible to engage employees to implementation practices and move towards leading change instead of only reacting to it (Sun 2007). Graetz (2000) furthermore, states change leadership plays a pivotal role in promoting and sustaining a change agenda, where especially critical are the middle or lower levels of managers.

1.2.2 Employee's role and engagement in strategic change

In organisations' adaption to change the people's role is essential to take into consideration simultaneously with the strategic, economic and technological issues (Ulrich & Lake 1991). Activity from the practice perspective means the employee's participation, practices and activities. Strategic management and chance literature seek employees' *performance* in strategic change. Clear goals and common understanding of the strategy are seminal (Hrebiniak 2006; Kaplan & Norton 1996; Yukl & Lepsinger 2007), like strategic intent (Hamel & Prahalad 1989/2010) or as Kotter (1995/2007) puts it a simple vision is needed to guide people through a major change process reducing the error rate. In order to make the vision and goals clear knowledge-sharing is essential (Davenport & Prusak 1998; Davenport, Prusak & Strong 2008; Seely Brown & Duguid 1991; Wenger 2000) as well as strategic *sensemaking* (Gioia & Chittipeddi 1991; Weick 2001) and informal, lateral *interaction* (Balogun & Johnson 2005; Ikävalko 2005). Knowledge must be applied to gain success and thus *learning*, *motivation* and *cooperation* are needed (Grant 1996; Helfat & Peteraf 2003; Kanter 2000; Teece et al. 1997). *Participation* in strategic planning affects positively the commitment of employees (Kohtamäki, Kraus, Mäkelä & Rönkkö 2012; Mantere & Vaara 2008), whilst exclusion from strategic conversation can have de-energizing effects (Westley 1990). Stensaker, Falkenberg and Grönhaug (2008) argue that participation, communication and sensemaking are closely linked and important during the whole action i.e. implementation. There can be found discourses promoting and impeding the employees' participation (Mantere & Vaara 2008).

However, activity solely does not explain the whole picture, because it can mean practices that are not linked to implementing the strategy or repetitive routinized performance without *engagement* in strategic change. Engagement is defined in organisational psychology by Schaufeli, Salanova, Gonzalez-Romá and Bakker (2002) and furthermore Bakker (eg. 2011) as constituting of three basic elements; *vigor* (feelings of a high level of activity and energy), *dedication* (feelings of enthusiasm, challenge, significance, meaningfulness and strong involvement in one's work) and *absorption* (being fully concentrated on and

happily engrossed in work so that time passes quickly). Purposeful pro-activity and engagement are needed in strategy implementation, which however can become a pointless and frustrating occupation without empowerment.

The empowerment of employees is substantive when implementing strategy. Knights and Morgan (1991) point out, that *power* involves providing individuals with the feeling of significance and competence to constitute an active role in strategy work. Amabile and Kramer (2010) and Ikävalko (2005) found in their studies that *encouraging* people has major impact on successful performance. Communication in strategy implementation is essential, but as Kotter (1995/2007) states deeds count more than words.

It is well documented in the research of organisational behavior and psychology that factors like *meaningfulness of the work itself, performance feedback, social support, safety, skills, autonomy and learning* are positively associated with *work engagement* (Bakker 2011; Bakker & Schaufeli 2008; Kahn 1990; Saks 2006; Shuck, Rocco & Albornoz 2010), which is an important antecedent of successful strategy implementation.

1.3 Methods

The essay is a multiple-case study investigating a contemporary phenomenon in depth and within its real-life context. The research is qualitative aiming at interpreting the phenomenon and practitioners' constructs holistically rather than looking for variables and causalities in a positivistic way (Piekkari & Welch 2011). The approach is constructivist (Charmaz 2006) appreciating the practitioners as part of the world they described (Charmaz 2006; Silverman 2001). A broader research question has made it possible to gather the data in an open-minded way, thus avoiding bias and too limiting *a priori* constructs (Eisenhardt 1989). Abductive research process benefits from a priori constructs and propositions guiding the data collection (Yin 2009) and inductive analysis giving voice to the practitioners (Charmaz 2006).

The cases and the practitioners were chosen from a larger amounts of conducted interviews according to theoretical selection including useful cases, large and small, global and local, sales and non-profit organisations (Eisenhardt 1989) and both managers and employees having a good picture of strategy work in practice in the organisation. The essay pursues rich case description and understanding of the employees' perceptions in change processes. The practitioners were asked to describe with their own words the organisation's strategy processes, their own tasks and perceptions of their roles. Interviews were recorded and carefully documented. The aim of the essay is to constitute 'a big picture' of the employee's role in strategic change, both looking at the antecedents and enabling factors as well as the aspired consequences i.e. activity, empowerment and engagement of the employees. According to the

propositions a holistic model was constructed drawing from prior research and the data.

1.4 Results

This section starts with a presentation of the case organisations and the participants (Table 2).

TABLE 2 The six studied organisations and the participants

Organisation	Participants
1 Large private concern and a part of a global provider of facility services, with more than 10 000 employees in Finland	Project manager, CEO Executive Assistant, HR Coordinator
2 Middle-sized private sales company with ca. 400 employees in Finland, headquarters in Europe. Part of a global seller of consumer and professional products and solutions	Development Director, Marketing Manager, Marketing Communicator
3 Small Finnish private owned non-profit foundation with clear global mission, part of a large global organisation	CEO, the president and two members of the board of trustees, an assistant
4 Large private Finnish concern, with levels from owners to cooperative units, working committees and the cooperative parent company, with more than 10 000 employees	Strategy manager, service manager, management assistant, 11 middle managers, 1 assistant
5 Large, Finnish traditional seller of consumer goods, ca. 3000 employees, the export unit and subsidiary having about 300 employees in Russia	Export Director and CEO Executive Assistant in the parent company, CEO and managers of marketing, logistics and administration in the subsidiary
6 Middle-sized multicultural Northern European sales concern's headquarters with nearly 200 employees with parent company in Europe, part of a global group manufacturing and selling durable consumer products	Strategic manager and CEO Executive Assistant, HR Coordinator, survey of middle managers and practitioners, 57 respondents out of 160

The first round of analysis examines through the practitioners' expressions of how the organisations encounter change. After that I study their expressed perceptions of their role and the positive and negative features they experienced in strategy work. Because the interview format was open-ended, the presentations reflect the issues mentioned as most important and cannot thus be compared by every detail. Finally, insights and contributions to practice and theory emerging from the data are discussed and reflected with the research question, propositions and with previous research. A holistic model integrating the findings is formulated and evaluated.

1.4.1 Encountering strategic change in the case organisations

The participants described the strategy processes in a very similar way in all the case organisations, whether large or small, business or non-profit, i.e. top-down as stated in functional management books and the employees' part was the implementation of the elsewhere designed strategy. Strategic change was thus mainly regarded as teleological i.e. purposeful target-oriented cooperative development (Van de Ven & Poole 1995). How the organisations encountered change is described here, summarizing the interviewees' expressions and comparing with the change patterns of dramatic, systematic and organic change that Huy and Mintzberg (2003) have presented.

Organisation 1, as a large global company, emphasizes effective cascading communicating of strategy and supporting systematic change through grass-root superiors. There is not much belief in organic change due to the employees' diversity, low level of education and lacking language skills.

> "The strategy is formulated in the concern abroad, my work is not in any way related to these processes." (CEO Executive Assistant, Org 1)

> "The managers and responsible persons have their business plans, but in practice the strategy work is really challenging. At the grass-root level everything depends on the superior." (CEO Executive Assistant, Org 1)

Organisation 2 has during the last years systematically improved the whole organisation's capabilities to encounter strategic change. In addition to the effective leadership efforts, both systematic and organic change has been supported in form of workshops and knowledge sharing and creation at all organisation levels.

> "This massive interactive process has been worthwhile as we have been able to dramatically enhance the quality and performance of the organisation." (Marketing Manager, Org 2)

Organisation 3 has also tried to develop the strategic dialogue. In the small, non-profit organisation, the strategy process is top-down, but the main efforts have been on the organic change among the people. The very operative-oriented management has instead systematized their ways of working.

> "In the latest strategy process we included the personnel in workshops, interviewed partners and made surveys. The result was a more compact mission statement, values and strategy." (CEO, Org 3)

In *Organisation 4* the strategy process and communication is challenging for all the forms of strategic change, because of the multilevel structure of the organisation with a large net of small local offices and decision making units. Still, the organisation is in a process of developing the dialogue in the strategy process and implementation.

> "The implementation processes are not clear, briefing is needed and continuous repetition. The strategy needs to be clear in order to be communicated in the units." (Middle manager, Org 4)

In *organisation 5* the strategy process is very traditional, top-down. Systematic change succeeds in daily work and cooperation lead by the middle management. In addition to supervisor support, organic change counts on training possibilities and trainee programs.

> "Communication towards owners is important, but also inside the organisation. Between parent company and subsidiary, managers' meetings are important, but they are still not needed every year". (Export Director, Org 5)

> "The communication at personal level is essential both inside the organisation and between the parent company and subsidiary. Informal communication up and down and with colleagues is most important in order to minimize misunderstandings." (Middle manager, foreign subsidiary, Org 5)

Organisation 6, has an effective concern lead global strategy process. However, an open dialogue, genuine diversity and cross-cultural cooperation are appreciated. Systematic change is supported through middle managers. Organic change is enhanced through job rotation and expat programs.

> "The organisation is young and multi-cultural, cooperation means intensive every day communication in global environment". (Strategic manager and CEO Executive Assistant, Org 6)

In all the organisations effective communicating of the strategy was emphasized, but the employees expressed they would have needed more knowledge, dialogue and support. Even in organisation 2 that had radically enlarged the possibilities for employees to participate the strategic discussion, and employees were pleased and committed, they would have wanted even more knowledge-sharing. Employees were given a chance to comment on the strategy before the decisions were made in the small and middle-sized organisations, even if in the latter, the guidelines to strategy came from the headquarters in Europe. It seems that there cannot be too much dialogue on the strategically essential work.

> "I don't know if the employees are asked anything, not me neither, the strategy comes from the headquarters and is presented as it is. Our executive team makes our strategy on the basis of it." (HR coordinator, org 1)

> "I participate in the discussion of communicating the strategy, it means knowledge-sharing towards all directions." (Communications coordinator, Org 6)

> "I know the strategy but still, I ponder on what it means to my work. It's good we now have information, but it would be good to hear more. There could be more interaction and transparency. The strategy could be a more concrete tool " (HR Coordinator, Org 1)

Employees experienced that the superior's encouragement and support had major value for their activeness. The importance of daily knowledge-sharing

and cooperation were emphasized. Middle managers correspondingly experienced strongly their mediating role. Communication was perceived as essential in understanding the strategy and strategic change.

> "It is the superior's task to communicate the meaning of the strategy to the employees and let the employees understand how important everybody's role is in mediating the strategy. People do not think of the strategy every day. That's why it needs to be reminded of constantly". (Middle manager, Org 5)

> "Feedback from the superior is really important, it needs to be continuous. Confidence and trust is important in the cooperation. I have my superior's full authorization to work independently." (CEO Executive Assistant, Org 5)

> "Knowing the strategy helps to see the big picture, to prioritize and manage the information flow. Understanding the strategy increases the meaningfulness of work" (CEO Executive Assistant, Org 6)

In the middle-sized organisations employees emphasized the importance of cross-functional and cultural cooperation, and in the largest organisations the cooperation between different organisation levels was underlined.

> "The biggest challenge in communication is the communication between the country organisations" (Strategy manager and CEO Executive Assistant, Org 6)

In Table 3 I compile the features that were mentioned to be perceived as positive or negative in strategy work.

TABLE 3 Employees' roles and elements they perceived as positive and negative in strategy work

Organisation	Employees' role	Positively experienced features in strategy work	Problems experienced in strategy work
1 Large service company	Big differences in white- and blue-collar workers' possibilities to take part in strategy discussion. Top Management tells the strategy to blue-collar workers via video conferencing system. Superior support essential.	Strategy workshops and sensemaking between top- and middle-management and white-collar workers. For blue-collars orientation to work.	Communication with diverse blue-collar workers without access to intra etc. Monitoring especially when employees work in partner companies.
2 Middle-sized company with strong sales orientation	Employees respected as practitioners that can take part in strategy discussion and plan the actions. Strategic workshops with all personnel, cross functional meetings and champions, weekly team meetings.	Cooperation with own superior and team, open discussion, knowledge-sharing, cross-functional cooperation.	Common understanding and sensemaking of the strategy.

(continues)

TABLE 3 (continues)

3 Small charity organisation with clear mission	Working values: involvement, equality, equity and solidarity. Different viewpoints respected. Developing strategy work together with Executive Director. Knowledge creation in workshops.	Weekly meetings with all personnel. Workers can influence on the agenda of the meetings of the board of trustees. Action program important in daily work.	Cooperation is not trouble-free, satisfaction with management and board of trustees actions is only moderate.
4 Large "very Finnish" service company	Equality, respect and representation of employees on all organisation levels, also locally, in decision making. Everybody's involvement, individual and team development are encouraged.	Open dialogue, supporting of middle managers' sensemaking and sensegiving. Common values are shared.	More support and interactive communication are wanted.
5 Large , traditional seller of consumer goods	Traditional role in effective, top-down strategy work. Cooperation between company units in matrix organisation, middle managers' role essential in sensemaking.	Knowledge-sharing through daily work. Discussion over functions on all organisation levels. Cooperation and well-established processes are appreciated.	Strong management and owner influence. Multilevel, matrix, rather bureaucratic organisation.
6 Middle-sized multicultural sales oriented head quarters	Diversity is respected. All personnel have possibility to take part in strategy discussion from the beginning. Strategy info to all units in tandem in English and local language.	Active communication, regular meetings and knowledge-sharing with all country organisations. Young personnel and culture. Middle managers' role essential.	Dialogue between countries. More interaction and cooperation with own superior is wanted. Young organisation. Strong parent company.

Cross-case comparison shows clearly that the features that were perceived as essential when encountering strategic change were most often related to interaction and communication. These were expressed in form of daily dialogue, knowledge-sharing, meetings and workshops. In all case organisations employees were encouraged to take part in strategy discussion and effort was put to distribute strategy information effectively to employees through several information channels. Still, even if these efforts were appreciated, the employees seemed to need primarily interactive interaction in daily cooperation in order to understand their role in strategy processes. The results are in line with the findings in Strategy as Practice (S-as-P or SAP) studies as well as Aalto University studies on strategy work (2000-2011) emphasizing the importance of multilevel dialogue. Systematic change (Huy and Mintzberg 2003) in the case organisations was most explicitly mentioned to mean comprehensive induction to work (org 1), workshops and cross-functional meetings (Org 2), supporting

middle manager activities in strategy implementation (Org 2, 4 and 6) and training (Org 5). These efforts were experienced as enhancing the employees' understanding of strategy and thus, an active, empowered and engaged role. The feelings of empowerment and engagement were expressed for example in following ways:

> "I have a strong 'HR identity' in our international HR team where I work independently. I started with assisting tasks, but now I have my own areas of responsibility." (HR Coordinator, Org 1)

> "The cooperation is based on learning, confidence and trust. I have been able to play an active and independent role, my superior says that it's good that I don't ask about everything. " (CEO Executive Assistant, Org 5)

> "I see my role as a motivator, encouraging subordinates is natural superior work. You need to offer them possibilities and challenges in order to achieve the targets. It also motivates me." (Middle manager, Org 4)

1.4.2 Evaluating and modeling of employee's role in strategic change

In this section I reflect the findings and previous research with the propositions that were set in the beginning of the study and formulate a holistic model of the perceptions of employee's role in strategic change.

Proposition 1). There can be found factors that employees' perceive enhancing their role in strategy work and implementation.

Both previous literature and the empirical data recognize similar kinds of factors related to employees' activity such as clear goals and common understanding of the strategy. Interaction is perceived as significantly more important by the practitioners than recognized by the mainstream literature. In all organisations the features named as most positive in strategy work can be related to different forms of interaction, such as knowledge-sharing, sensemaking and cooperation. Effective top-down information was appreciated but an open discussion culture was mentioned as most important. 'Open discussion culture' again was explained with various aspects of good interaction between people. The interaction with own superior and team were experienced as most relevant, while also cross-functional and cultural meetings and cooperation were appreciated. Correspondingly, most often mentioned challenges in strategy work were related to interaction with people. Additionally technical problems, monitoring and bureaucracy were frequently mentioned problems.

Proposition 2). Managerial actions can empower employees in playing an active role in implementing strategic change.

Even though the practitioners seemed to have rather independent working roles, the managers' contribution was mentioned as very important for the

empowerment the practitioners perceive in strategic change. This manifests that organisations' hierarchies still effect powerfully on how practitioner's perceived their role. Top-management presentations of strategy, road-shows and personal commitment were appreciated. However, possibility to knowledge-sharing and daily cooperation with own superior and team were experienced as the most effective way of understanding the meaning of strategy in one's own work. Moreover, managers' support, encouragement and feedback were frequently mentioned as essential.

Proposition 3). Employees' activity and empowerment enhance their engagement and possibility to plan their own work.

The interviewees expressed that participation in strategic discussion and knowledge-sharing enhance their possibility to see 'the big picture' and feeling of empowerment at work. They mentioned that understanding the strategy was important and 'fun', enhancing their possibilities to prioritize and plan their work schedules more independently. The empowered practitioners experienced the significance of their work as part of the organisation's work, were highly committed and could take a more active role in the processes. Reflecting according to Huy and Mintzberg's (2003) categorizing the role of the employee is in the midst of top-down changes, systematic professional development at all levels of the organisation and individually making self-managed development of work possible.

Helping employees develop their roles can preferably be systematic for instance training, or supporting the organic learning at individual level, starting in the annual target setting discussions between superior and subordinate and continuing in the daily cooperation instead of occasional one-time experiences. As Mintzberg (1990) states strategy is a 'fundamental congruence between external opportunity and internal capability' and can thus be the link needed between planning and action, as well as managers and employees. The empowered middle-level practitioners were able to utilize strategy as this kind of a link, enabling the understanding of own role as part of the organisation's goals, enhancing their engagement in strategy implementation and thus, managing own work more effectively and independently.

Proposition 4). Helping employees develop their role in strategy work enhances the organisational adaption of strategic change and the implementation of strategy and thus, organisational performance.

The middle-level practitioners' practices and skills seemed to facilitate understanding the meaning of strategy in the organisation, the adaption to the change and thus enhance strategy implementation greatly. Middle managers mediated the strategy, encouraged and supported the employees in the implementation. Management assistants communicated and translated the strategy to employees, organised strategic meetings, workshops and events, facilitated strategic planning and coordinated the implementation efforts. These

practitioners can have a championing change agent position facilitating organic change in the organisations (Kotter 2012; Mantere 2003; Ulrich, Brockbank & Johnson 2009). The facilitating initiatives are especially important, whilst individual change processes cannot easily be managed from upwards and demand communication and support at all organisation levels in order not to become chaotic as Huy and Mintzberg (2003) state. Furthermore, Kotter (2012) suggests these change agents have the spirit of volunteerism and desire to work with others for a shared purpose energizing the social networks and accomplishing tasks faster and cheaper than hierarchies can. By better recognizing the supporting practitioners' potential, organisations would gain through better organised and more effective strategy work.

The research question was **"How is employee's role perceived in strategic change and how can employees play a more active, empowered and engaged role in dealing with strategic changes?** According to the empirical findings among middle-level practitioners and the previous research I can now summarize the essential elements of an active and engaged employee's role in strategic change. Against mainstream managerial models the factors that the practitioners described as essential were mainly social rather than rational, economical or technical to their character. Most often mentioned factors were different forms of interaction, especially the daily dialogue. Managerial actions were perceived as empowering employee's active role both as top-down change effect as more systematic superior support. The practitioner's own activity, empowerment and engagement formed the base of a balanced employee's role increasing the possibility to plan one's own work and cope with changes through organic learning and development at individual level.

The employee's position is in the midst of vertical and horizontal change initiatives, demanding adoption of new ways of working. Many studies show that the employees' successful performance enhances the organisational outcomes, as for example Bakker and Schaufeli (2008) and Cameron and McNaughtan (2014) state. The pattern is, however, not a simple causal relationship, but a dynamic circle getting its strength from diverse, also informal directions. Explaining the multifaceted role of employee in strategic change cannot be done with one or two factors and variants, instead a more holistic model is needed, linking the different elements together. Moreover, applying Huy and Mintzberg's (2003) idea of creating a 'rhythm of change', stability for practitioners can be created with supporting an empowered role in good balance of dramatic, systematic and organic change, so that they can pro-actively plan the actions needed in strategic changes. No single element ensures strategic thinking, learning and acting, but instead several important elements influencing each other and linking together are needed as Senge (1990a/2006) argues. Balogun and Hope Hailey (2004) similarly state there is no one best way to change for organisations.

The model in Figure 1 compiles the elements of employee's active, empowered and engaged role in dealing with strategic change answering the research question and the propositions. The dynamic process can be described

with activity theory developing strategic practices as continuously flowing goal-oriented social and individual interaction and learning in multilevel networks of the organisation (Engeström 1999/2003; Jarzabkowski 2010). A positive message for managers trying to cope with the totality of strategic change in organisations is that a perfect model covering 'all' factors is not necessary and the efforts needed to keep the circle rolling are surprisingly small, even though constant reasonably 'simple' issues like interaction, sensemaking and shared understanding of the changes. Often nothing more than *awareness* and *respect* of the employee's essential role to handle strategic change is needed. The efforts to keep up the daily dialogue in the organisation is worthwhile encouraging the employee's activity releasing the embedded dynamicity and both extant and latent skills, nourishing creativity and capabilities generating organisational assets and promoting competitive advantage (Regnér 2008). The dynamicity of encountering change is thus embedded in the employee's active, empowered and engaged role enabling pro-active practices and stability in strategic change.

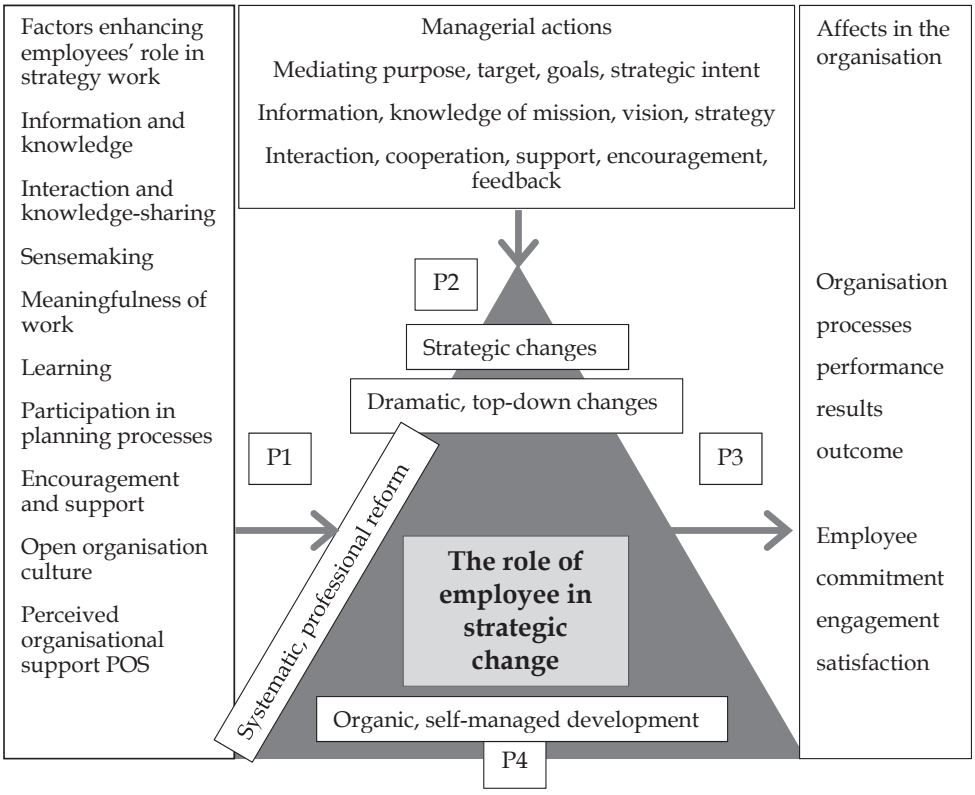

FIGURE 1 A holistic model combining the elements of employee's active role in strategic change (P1-4 refer to the propositions stated at the beginning of the research)

The structure of the model per se provides no novelty for strategic management research. Of value is instead for the *first* that the model's main emphasis is on

constant social and organic activities instead of top-down effective strategy implementation that is the mainstream idea, and *second* that the empirical and qualitative results are based on *the employee's perceptions and point of view* whilst the mainstream literature addresses on managerial and organisational viewpoints and quantitative measuring. The extant research has predominantly treated the employee as an object instead of a subject in strategy processes, and it is of time to see the potential of employees' strategic activity in successful strategy implementation and organisations' performance.

1.5 Conclusions

The results imply that the role of the employee in strategic change is predominantly regarded as part of top-down change. Mintzberg and Huy's (2003) portrayed systematic and organic change from employee's point of view is only little by little becoming more important in practice. Understanding the employee's role in strategic change is still inadequate also in research. Participation in strategic discussion, encouragement and support enhance the employees' possibility to see 'the big picture', see the significance of own work and engage actively in strategy implementation. Stability for employees can be created with enhancing their active role in strategy process, so that they can pro-actively plan the actions needed in strategic changes. The empirical results suggest that middle-level practitioners between management and front line personnel would have more potential in developing implementation of strategic change. Middle managers are aware of their key role in mediating the strategy, and even if their role is recognized, they do not always get enough support when implementing strategy. Management assistants can have the skills and potential to an essentially more important role in facilitating strategic change. The research recognizes diverse factors that make it possible for employees to play an active role in strategy work. Both empirical and theoretical findings suggest that a combination of these factors creates the prerequisites needed. The main underlying factor seems to an open discussion culture with mutual respect among managers and practitioners enabling a good cooperation. The employees perceive that an active role in strategy work makes it possible for them to better engage and adapt to strategic changes.

The research contributes to understanding of employee's role in strategic change, limiting however to study practitioners' roles and perceptions in only a small amount of chosen organisations. More empirical research is needed to understand in more profound how to activate, empower and engage employees' in the messy realities of strategic change in organisations. Cross-disciplinary research of *Strategic Leadership* could be needed in order to develop employee roles in strategic change.

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II

IDENTIFYING FACTORS RELATED TO EMPLOYEE'S ENGAGEMENT IN STRATEGY IMPLEMENTATION

2 IDENTIFYING FACTORS RELATED TO EMPLOYEE'S ENGAGEMENT IN STRATEGY IMPLEMENTATION

ABSTRACT

This essay explores factors that are experienced as related to employee's engagement in strategy process, in particular strategy implementation. The empirical data consist mainly of semi-structured interviews in six different kinds of organisations. Both practitioners and their superiors are interviewed in constructivist spirit to gain understanding of the characteristics of strategy processes and employees' engagement in practice. The data are analyzed qualitatively in an abductive process and the findings are reflected with previous research. The results suggest that employees experience interaction as most critical for their engagement, while managers perceive the interaction has been sufficient. The findings indicate that no one factor alone is essential for building engagement but rather a good combination of several factors that are linked together are needed to help create an open, interactive organisation culture where employees can engage. A conceptual model is constructed as a tool to interpret factors related to employees' engagement in strategy implementation. The research contributes to strategic management research and in particular Strategy-as-Practice view, by increasing the understanding of employee's engagement in strategy implementation at micro-level.

Key words: Strategy process, strategy implementation, employee's engagement

2.1 Introduction

Implementing strategy is the biggest challenge of strategic management. The employees play a key role in the implementation, yet, research has not much focused on how they engage in the processes. Strategy implementation is separated from strategic planning and employees do not understand the strategy and their role in the implementation. However, strategic management research has mainly addressed strategy content and economic performance instead of the people implementing the strategy (Furrer, Thomas & Gouvsseskaia 2008; Vaara & Whittington 2012). Even the latest action and practice oriented Strategy as Practice (S-as-P) literature has mostly focused on management issues (Carter, Clegg & Kornberger 2008; Johnson, Melin & Whittington 2003; Mantere & Vaara 2008). It is important to explore how employees experience they can better engage in strategy processes in order to solve the problem of strategy implementation.

The research on engagement in turn is a rapidly growing avenue of research mainly in the traditions of organisational psychology (Albrecht 2010; Cameron, Dutton & Quinn 2009) being at the same time separated from and intertwined with the research of strategic management. Despite advances of the field, Albrect (2010) states there still remain questions to be answered, for example how work-related engagement can be defined and explained with theories, what are the key drivers, what is its relationship with organisational outcomes and performance and how can it be measured? These questions are relevant also to strategic management research.

This essay aims at an overview of key drivers of engagement in strategy work context. The main purpose is to interpret in constructivist spirit what kinds of factors people perceive as engaging in the strategy implementation. The cases are analysed reflecting to literature of strategic management and organisational psychology. The research question of the essay is "**What kinds of factors are related to employees' engagement in strategy implementation?"**

At the beginning of the process the studied *themes* came from the problem in practice and traditional manager oriented literature and were broad categories of leadership and management, communication, learning and knowledge, organisation culture and the employee's role. The following new, more or less overlapping theme groups and relations emerged in this process:

- strategy processes, practices and communication
- people, roles, empowerment, engagement
- interaction, dialogue, knowledge-sharing, teamwork
- action, cooperation, encouragement, support, trust
- knowledge, sensemaking, common understanding of the strategy
- competence, capabilities, learning
- organisation culture

The literature review tries to get an overview of these themes, even though they not only overlap each other but can have a causal effect on one another. Furthermore, the relations between them are dynamic and the categories can be formed differently in different contexts.

2.2 Methods

Qualitative case study and interpretive analysis were chosen in order to better understand a complex, real life issue (Aharoni 2011). The approach is flexible and pluralistic in order to understand the cases more holistically (Piekkari & Welch 2011; Ragin 1987). The cases were chosen on theoretical basis (Eisenhardt 1989) from a larger amount of cases studied. The aim is to cope with rich, real-world context and conceptualize the factors that are perceived as most relevant (Eisenhardt and Graebner 2007). The participants were chosen so that they were both managers and employees having a good picture of the strategic practices in the organisation.

The interviews were conducted with a humble ethnographic intent, appreciating the practitioners as part of the world they described, focusing on their perceptions and ways of working and interacting as seen by themselves, however, keeping the discussion on the track of the research question. This kind of intensive interviewing, i.e. open-ended yet directed and shaped yet emergent approach produces data with narrative character (Charmaz 2006; Silverman 2001). Interviews were recorded and documented.

The data were color-coded for the first phase of analysis according to broad themes. The practitioners' emic perceptions were studied in more detail and factors related to engagement were identified. The themes were then re-evaluated going back to the recorded interviews and memos, consequently comparing wth literature. The emerging new aspects were categorized for the second phase of analysis and hermeneutic reflecting. Rather than mechanical comparing of the cases qualitative and sensitive reflecting (Coffey and Atkinson 1996) and constructivist interpreting (Charmaz 2006) were used. The abductive reasoning is opened up and the emerging aspects and their relationships gathered to a holistic model. Silverman's (2001, 222) criteria for qualitative research were applied for example when evaluating the approach, the nature of interview questions, formulating the research question and analysing the data.

2.3 Employee engagement and related constructs

The discussion of employee engagement can be traced back to Kahn (1990; Albrecht 2010, 3) who studied people's experiences of themselves, their work and its contexts and found a wide range of factors that shape people's personal

engagements and disengagements. Most important of these were *psychological conditions* like meaningfulness, safety and availability on multiple levels of influences, individual, interpersonal, group, intergroup and organisational (Kahn 1990). Perhaps most cited is the definition of engagement presented by Schaufeli, Salanova, Gonzalez-Romá and Bakker (2002; Albrecht 2010) as 'a positive, fulfilling work-related state of mind characterized by three basic elements; *vigor* (feelings of a high level of activity and energy), *dedication* (feelings of enthusiasm, challenge, significance, meaningfulness and strong involvement in one's work) and *absorption* (being fully concentrated on and happily engrossed in work so that time passes quickly)'. Of these dimensions however, absorption has been suggested should be considered a consequence rather than one of the core components of engagement (Salanova and Schaufeli 2008).

Albrecht (2010, 5) proposes an integrating universal core definition of employee engagement as 'a positive work-related psychological state characterized by a genuine willingness to contribute to organisational success'. This core definition is well-placed in the thinking of strategic management that seeks organisational success in form of organisational performance and outcome. According to Albrecht's review (2010, 7) research on employee engagement is linked to several theories that are interesting from the point of view of employee's engagement in strategy implementation, for example role theory (Kahn 1990), self-determination theory (Ryan & Deci 1985) and job characteristics theory (Hackman & Oldham 1980).

There is obvious overlap between employee engagement and other related constructs such as organisational commitment, job involvement and job satisfaction as all these refer to positive work-related psychological states, however, there is considerably research and theory suggesting employee engagement is a unique and distinct construct (Albrect 2010, 6). From the perspective of successful strategy implementation, engagement portrays as a more active and energetic construct as for example job satisfaction that is still mainly measured at workplaces. It can be argued that the relatedness of concepts enrich the field, however it can simultaneously pose difficulties for analysis because the constructs can have complex relationships of cause and effect. Xanthopoulou, Bakker, Demerouti and Schaufeli (2009) found in their longitudinal study that job resources, personal resources, and work engagement are reciprocal over time, and that not only resources and work engagement but job and personal resources were mutually related, supporting thus the assumption of various types of resources and well-being evolving into a *cycle* that determines employees' successful adaptation to their work environments.

Management and organisational research identify moreover other related constructs aiming at understanding successful behavior of employees. One of the most cited is *organisational citizenship behavior* (OCB), first defined by Organ 1988 (Organ 1997; Podsakoff, MacKenzie, Paine & Bacharach's 2000) as an 'individual behavior that is discretionary, not directly or explicitly recognized

by the formal reward system, and that in the aggregate promotes the effective functioning of the organisations'. Related to OCB is *championing* behavior which in strategic context has been defined by Mantere (2003; 2005) as employee behavior trying to influence strategic issues larger than their own immediate operational responsibilities. Moreover, *thriving* workforce is a very similar construct to engaged employees which Porath, Spreitzer, Gibson and Garnett (2011) and Spreitzer and Porath (2012) regard as a 'psychological state in which individuals experience both a *sense of vitality and learning*'. Thriving employees are engaged in creating the organisation's and their own future; they perform better, are more committed, satisfied and healthier than employees in average (Porath & Spreitzer 2012). According to Bakker and Schaufeli (2008) building engagement can be a long and difficult process, but the effort is worthwhile, because it improves not only the results of the organisation but also the overall working culture. Because of the relatedness of the constructs and the constructs often being the outcome rather than objective of research, the literature review in next chapter on the drivers of engagement does not distinguish too strictly between these.

2.4 Main drivers of engagement in strategy implementation

Employee engagement is a highly social phenomenon. Studies have consistently shown that job resources such as social support from colleagues, performance feedback, skill variety, autonomy, and learning opportunities are positively associated with employee engagement (e.g. Bakker 2011). Shuck, Rocco and Albornoz (2010) found that relationships in the workplace and the direct manager as part of the organisational culture as well as learning opportunities were essential for engaged employees' interpretation of their work. According to Saks (2006) several factors can predict engagement, such as job characteristics, perceived social support, rewards and recognition, cognitive, emotional and social resource and benefits. Emphasis on job resources and engagement matter as it is found that they together increase both intrinsic motivation and proactive behavior (Salanova & Schaufeli 2008) and organisational commitment (Hakanen, Bakker & Schaufeli 2006; Hakanen, Schaufeli & Ahola 2008). In addition to intrinsic motivation, engagement is related to feelings of self-determination that in turn is related to well-being (Ryan & Deci 2000).

In the research of strategic management employee engagement is mainly treated as a preferred outcome of managerial actions rather than the objective of the research. There is to my knowledge no established universal definition of what specifically is meant with employee engagement in strategic context. The main aim of strategic management field is successful performance of organisations and engagement is seen as an employee state leading to it. Hence,

the review of the main drivers of this behavior similarly assumes these concepts are interlinked.

The strategic management literature agrees on many points concerning the factors that motivate employees in the strategy process. Since Chandler's time in the 1960's up to the present researchers have shared the concern of *clarity on fundamental issues* like intentions of strategy, mission, vision and values of the core business (Mintzberg & Waters 1985; Nohria, Joyce & Robinson 2003). *Clear goals* and guidelines for implementation are essential for successful implementation (Hrebiniak 2006). Nutt (1999) found out that managers, who make the need for action clear, set objectives, carry out unrestricted search for solutions and get key people to participate, are more apt to succeed. Hamel and Prahalad (1989/2010) call for strategic *intent* that captures employees' imagination and clarifies criteria for success. Kaplan and Norton (2008) argue that companies with motivating targets for employees that were followed up in regular discussions were more likely to be successful. Yukl and Lepsinger (2007) claim that high performance is more likely when people know what to do and how to do it. People need to know their *roles* and *responsibilities* and the expected results for their tasks. They need help in setting priorities and meeting deadlines. Participation in the operational planning improves commitment to goals. Well-defined objectives focus people on important activities and encourage them to find more efficient ways to do the work.

Communication is largely accepted as essential to successful strategy implementation. For example Kaplan and Norton (2008) found support for the importance of regular meetings in the implementation. However, the communication in strategy processes is predominantly seen as top-down cascading information both in theory and practice. Instead of one-way information, rational effectiveness and control, the latest research suggests focusing on *action*, *interaction* and *sensemaking* (Aalto University 2000-2011; Hrebiniak 2006; Weick 2001) and practices, praxis and practitioners (Carter et al. 2008; Vaara & Whittington 2012; Whittington 1996). Sensemaking is especially pivotal between top and middle management and at the middle-level of the organisation (Gioia & Chittipeddi 1991; Floyd & Wooldridge 1992; Wooldridge, Schmid & Floyd 2008). According to Weick, Sutcliffe and Obstfeld (2005) employees feel ambiguity in change situations, search for meaning and need sensemaking, plausibility and a socially shared story. Thus, micro-level actions of sensemaking, descriptions that energize, resilience and self-responsibility have substantive impact on their activity (Weick, et al. 2005).

Several studies imply that *action*, *participation* and *cooperation* are essential for successful strategy implementation. Amabile and Kramer (2010) noted in their research that people were most motivated in their work regarding *progress* and good collaboration with colleagues. According to Mintzberg (1994) managers that were committed to the implementation engaged people to bring the strategy alive. Kohtamäki, Kraus, Mäkelä and Rönkkö (2012) in turn found that participation affects positively the commitment of employees. Stensaker, Falkenberg and Grönhaug (2008) noticed that participation in strategic planning

facilitates sensemaking and a better understanding, but did not necessarily lead to organisational sensemaking and action. Weick (1993/2001) states that action leads to sensemaking processes and is thus intelligence. Stensaker et al. warn, like Mintzberg (1994) and Drucker (2009) about believing too much in planning and thinking before doing. Instead, they suggest action, trial and error. Both S-as-P and process research emphasize action and practices in strategy processes.

Encouragement and *support* have a major impact on successful performance. Amabile and Kramer (2011) found that respecting employees' work, supporting them in their daily activities and encouraging them in even small wins lead to better motivation, creativity and engagement. Major role in the support have the middle managers. Ikävalko (2005) noted that strategy implementation at its best was cooperation and knowledge-sharing between managers and employees involving executing, facilitating, empowering, reflecting and learning. There is a large body of organisation psychological literature on POS, Perceived Organisational Support, starting from Eisenberger's, Huntington's, Hutchison's and Sowa's research 1986. With POS is meant employees' belief that the organisation values their contribution and cares about their well-being (POS, Perceived Organisational Support Website 2012). Rhoades and Eisenberger (2002) reviewed more than 70 studies concerning POS, and found a statistically highly significant relation between POS and performance.

Knowledge, together with action, is the basis for strategy implementation. Grant (1996) argues that management's most important task is to coordinate specialist knowledge integration, which is a challenge even though there might be no conflicting goals. Davenport and Prusak (1998) pointed out that the best companies create, share and apply knowledge through facilitating informal and across-the-board networks. They argue that most important factors for knowledge management are *cultural* issues, leadership, values and trust as well as face-to-face knowledge-sharing, regardless of the technology development. Davenport, Prusak and Strong (2008) claim there is no single recipe for managing knowledge; it is most essential that it is pragmatic. According to Nonaka (1991, 1994) and Nonaka and Toyama (2003) knowledge creation is a continuous dialogue between the tacit and explicit knowledge through interaction among individuals, organisations and the environment. Knowledge needs to be *applied* in the daily practices and success of an organisation. Thus, *learning* and knowing as dynamic activities are needed. Similarly knowledge-sharing is critical to learning and knowledge management (Helfat & Peteraf 2003; Small & Sage 2005/2006; Teece et al. 1997). Improving strategy implementation starts with utilizing and improving the capabilities of people. Single courses are not the solution; instead, dynamic social *learning systems* and *forums* are needed for learning, knowledge-sharing and creation, as well as time for the knowledge processes. Teamwork, instead of highly structural organisations, makes knowledge-sharing easier for employees (Katzenbach & Smith 1993/2005). Teams offer its members non-stop opportunities for real-time learning and integrating their contribution into creative, intelligent collaboration (Hackman 2011). Nonaka and Konno (1998) suggest forums, 'ba's

for knowledge processes. Seely Brown & Duguid (1991) and Wenger (2000) in turn, suggest 'Communities of Practice' (CoPs), based on voluntary participation and innovation, found to be fruitful forums for knowledge-sharing and social learning. The advantages of these systems include collegiality, reciprocity, expertise and a contribution to practice and learning.

2.5 Results

In this section I first present the case organisations and the participants and their perceptions in strategy processes. In the *first* phase of categorizing I compile factors that employees perceived as positive and negative in strategy work. In the *second* phase of analysis I study in more detail the factors that were experienced as related to employee engagement. The factors that emerge from the data as most important are information and knowledge, dialogue and knowledge-sharing, cooperation and social learning and the organisation culture. These factors are then compared between the cases and in relation to the reviewed literature. *Finally* drawing on the data and the literature, a model of the concepts and their relationships to one another is constituted.

2.5.1 Strategy processes and practitioners' experienced roles in them

The chosen organisations were theoretically interesting "polar types" (Eisenhardt & Graebner 2007). Organisation 1 is the biggest of the studied organisations and had for strategy implementation a challenging culture, clearly divided in white and blue collar workers. Organisation 3 is a non-profit association and the smallest organisation with only 13 employees, even though active worldwide. Fairly comparable with one another are organisations 2 and 6; both sales organisations and a part of a global concern. Organisations 4 and 5 are large and rather traditional more local companies. The case organisations and the main data sources are presented in Table 4.

The participants described the strategy processes as top-down proceeding. However, more than half of the organisations (1-4) were in the process of starting to apply more interactive methods in the strategy process. The strategy work in the case organisations was seen as top managers' job, even though employees in all case organisations were encouraged to participate in strategy discussion. Most encouraging the culture was in organisation 2, making huge efforts to improve strategy work, and least in the rather traditional organisation 5. However, the employees in organisation 5 were committed and satisfied with their roles as clear goals, daily cooperation and capabilities were appreciated. In the smallest organisation there could be seen strategic frictions between management and the expert employees, even though the mission was clear and shared and

equality was an important corner stone in work. In organisation 6 with young personnel the communication culture was active and the employees' commitment high, still employees perceived problems in strategic discussion and even more cooperation and interaction with own superior and across unit boundaries was wanted.

TABLE 4 The studied six organisations and the participants

Organisation	Participants
1 Large private concern and a part of a global provider of facility services, with more than 10 000 employees in Finland	Project manager, management assistant, HR Coordinator
2 Middle-sized private company with strong sales orientation, about 400 employees in Finland, the headquarters in Europe. A part of a global seller of consumer and professional products and solutions	Development Director, Marketing manager and HR Specialist
3 Small Finnish private owned charitable foundation with clear global mission, ten employees in Finland and three on field abroad, part of a large global organisation	CEO, the president and two members of the board of trustees, office manager
4 Large private Finnish concern, with levels from owners to cooperative units, along with their trade unions, working committees and the cooperative parent company, with more than 10 000 employees	Strategy manager, service manager, 11 middle managers, 1 assistant
5 Large, Finnish traditional seller of consumer goods, about 3000 employees, the export unit and subsidiary having about 300 employees in Russia	Export Director in the parent company, CEO and managers of marketing, logistics and administration in the subsidiary
6 Middle-sized multicultural northern European sales concern's headquarters with nearly 200 employees with parent company in Europe, part of a global group manufacturing and selling durable consumer products	Strategic manager, CEO Executive Assistant, HR Coordinator, a survey of middle managers and practitioners, 57 respondents out of 160

The practitioners participating in the research perceived mostly they were engaged in their work. In particular, middle managers, officers and specialist that perceived they had enough strategic knowledge through their daily cooperation in the organisation experienced great energy, dedication and absorption in their work. Most engaged in these data were the CEO and management assistants who participated in the executive team and had thus all the information they needed for facilitating strategy implementation. They were active in the interaction towards all directions in the organisation at formal and informal level. Least satisfied were middle managers only attending in extended executive team meetings or middle managers feeling isolated in area units without daily strategic knowledge-sharing and sensemaking with their superiors. They expressed the strategy remained remote and supporting employees thus as challenging. Pappas and

Wooldridge (2002) have likewise shown how important social networks and strategic knowledge are from the middle-level perspective in organisations.

2.5.2 The factors perceived as most engaging

In this section I discuss the factors that were experienced as most important for employees' engagement and the challenges in strategy work in the case organisations. I then collect and compare the factors and try to find the relations and linkages between them. Finally I make an effort to summarize the factors and their relations in a comprehensive model.

The factors the practitioners named were rather similar to each other. Effective *information* distribution was mentioned in large and middle-sized organisations, and correspondingly knowledge-sharing and common understanding of the strategy were named as the biggest challenges in all organisations. Frequently named factors that were similar to the strategic management literature were e.g. *clarity of goals, mission, roles and responsibilities*, similarly as *competence and learning*. Only in two organisations *rewarding* was mentioned (org 2 and 5). In organisation 5 systematic *monitoring* was underlined as a positive element. Correspondingly only in organisation 1 monitoring at the lower organisation levels was seen as a challenge.

Most of the mentioned factors were related to the *communication culture* of the organisations. Effective information sharing was perceived as important, but most of all people wanted *interaction* and *knowledge-sharing*. *Supervisor support* and *sensemaking* with top and middle-management was seen important in all organisations except of the smallest one (org 3) without any levels between the personnel. Only organisation 2 seemed to have sufficiently communication also cross-functionally, involving practitioners at all organisation levels. In organisation 6 the communication culture was open and active, still, the employees wanted more communication and cooperation. These results are supported by Aalto University studies on implementing strategy (2000-2011).

Mainstream strategic management literature does not discuss much social phenomena in organisations. However, authors like Weick (2001), Johnson et al. (2003), Hrebiniak (2006), Regnér (2008) argue that an organisation culture that has various attitudes and behavior with respect towards and belief in people, interaction, communication and cooperation enhance employees' engagement in strategy process. The organisation psychological research suggests similarly that factors like social support from colleagues and supervisors, feedback and recognition, learning and autonomy are essential elements of employee engagement (Bakker 2011; Saks 2006). These factors were mentioned as essential also in the case organisations. Elements that were perceived as enhancing engagement in strategy process and as the biggest challenges in strategy implementation in the case organisations are presented in Table 5.

TABLE 5 Elements experienced as enhancing and challenging engagement in strategy process

Organi-zation	Elements enhancing employee engagement	Challenges
1 Large	Effective info distribution Clear mission and processes Sensegiving from top to middle level Competence in own tasks Roles and responsibilities Supervisor's support	Knowledge-sharing Common understanding of strategy Sensemaking on lower organisation levels Monitoring on lower levels Cooperation and interaction between levels
2 Middle-sized	Knowledge creation and sharing on all levels Emphasis on sensegiving and sensemaking Open communication and monitoring Competence and social learning Cross-functional cooperation Supervisor support Action orientation, rewarding	Common understanding of strategy Everybody's commitment and engagement Common organisation culture
3 Small	Clear mission and commitment Competence and motivation Knowledge-sharing in all work Interaction and action orientation Clear standpoints of organisation culture	Shared vision and strategy Interaction and support in field operations Processes and routines on field
4 Large	Emphasis on knowledge distribution Sensegiving and sensemaking between top and middle-level Encouragement and support Clear practices, roles and responsibilities Interaction on all levels Focus on capabilities and development	Knowledge-sharing between organisation levels Common understanding of the strategy Sensegiving and sensemaking in different units Common organisation culture in big concern
5 Large	Clear mission and goals well-established organisation culture Motivation and engagement Effective info distribution Competence and cooperation Emphasis on effective processes Systematic monitoring and bonus system Individual learning and development	Sensemaking on lower organisation levels Big matrix organisation knowledge-sharing Hierarchical structure of decision making
6 Middle-sized	Effective communication, clear goals Diversity of people and interaction Sensegiving and sensemaking between top- and middle management Knowledge and cross-functional competence Action orientation	Old and young, local and global organisation culture Common understanding of strategy Changing roles and responsibilities Cooperation between countries Global bureaucracy and local small scale processes

The interaction was easiest in the smaller organisations and most challenging in the largest case organisation (Org 1) in which most employees were blue collar workers without sufficient language skills to discuss strategy and have access to the organisation's intranet. Their knowledge of strategy depended on their superior's involvement and communication skills.

As the interaction and the organisation culture manifested as the most important factors for the practitioners to play an active role in the strategy process, they are studied in more detail and divided into new categories named *information and knowledge, dialogue and knowledge-sharing, cooperation and social learning* and *organisation culture*, including elements like values, engagement, action orientation and encouragement. The emerging categories are presented in Table 6 and thereafter reflected with the reviewed literature.

TABLE 6 Most important factors related to information, knowledge-sharing and organisation culture

Organization	**Information/ knowledge**	**Dialogue/knowledge-sharing**	**Cooperation/social learning**	**Organisation culture**
1 Large	Emphasis on top-down information, many levels a challenge, a lot of work is done to distribute the info through several channels.	Between top- and middle-management, white-collar workers, orientation to work is seen very important.	Between top- and middle-management, white-collar workers. The lower level superiors teach the blue-collar workers, there is no monitoring.	Big differences between white- and blue-collar workers and their possibilities to take part in the discussion.
2 Middle-sized	Information from top down and knowledge creation in workshops with whole personnel.	Strategic workshops with whole personnel, cross functional meetings, weekly team meetings, cross-functional champions.	Cooperation in strategic issues, Quality and Development work on all org. levels down to teams with own superior, cross-functional teamwork, Monitoring weekly.	Strong sales and profit orientation, open discussion, open monitoring, transparency, cross-functional cooperation, bonus system, commitment.
3 Small	Clear mission, knowledge creation in workshops. Strategy info is in more detail in action program that is followed in daily work.	Weekly meetings with all personnel. Workers can influence on the agenda of the meetings of the board of trustees. Also partners are consulted.	Action according to plan, follow up and evaluation together. Executive Director is developing strategy work together with the personnel.	Involvement, equality, equity and solidarity. Different viewpoints are respected.
4 Large	Strategy process starts from top with representation from the different levels of the organisation. Information creation on all org levels.	Open dialogue is emphasized. Supporting middle managers' sensemaking and sensegiving sees as very important.	Everybody's involvement, individual and team development are encouraged.	The culture is very "Finnish", emphasizes locality, openness and representation of all organisation levels in decision making.

(continues)

TABLE 6 (continues)

5 Large	Emphasis on effective top-down information and middle managers' sensemaking. Own targets on every level.	Top- and middle managers, for personnel knowledge-sharing through daily work. Discussion over functions on every organisation level.	Cooperation appreciated. Systematic monitoring. Well-established processes.	Traditional way of working. Strong commitment and appreciation of management and owners. HRD appreciated.
6 Middle-sized	Strategy info to all units in tandem in English and local language and active communication are important in Pan-European company.	All personnel have possibility to take part in the discussion of the strategy from the beginning. Middle managers' role is essential.	Action orientation. Meetings regularly on all levels within all countries. Rotation of roles and good view on all functions and markets.	Multicultural co-operation daily practice. Strong sales orientation. Young organisation, personnel and culture. Strong parent company.

Informing the strategy was experienced as the basic requisite for employees' activity in strategic discussion. In particular in the largest case organisations the importance of effective information distribution was emphasized. Strategic knowledge creation with all personnel required intentional and organised actions and succeeded well in organisations 2 and 3.

Strategic dialogue and knowledge-sharing were recognized as important between top and middle-management as also Gioia & Chittipeddi (1991) and Weick 2001) state. The importance of informal, both vertical and lateral interaction were underlined similarly by Balogun & Johnson (2005) and Ikävalko (2005). The largest case organisations noted the importance and challenges of these processes. Knowledge-sharing was experienced as easier in small and middle-sized organisations, even though trouble-free knowledge-sharing was not self-evident in the smaller organisations either.

Organisation cultures were very different in the studied cases. Only the organisations with global parent company (2, 6) had more similarities in culture. Sales and action orientation were strong in these cultures, but the strong parent company, despite of providing a strong common culture, caused also more bureaucracy in daily actions. Divided culture in organisation 1 complicated the interaction in strategy work. These problems were fought with effective information distribution and support on the lower levels. Clear, shared values in organisation 3 helped the otherwise challenging cooperation with strong individuals and geographically scattered work. Strong positive common culture in organisations 4 and 5 tackled many problems large organisations may have in interaction and cooperation. Involvement and engagement were enhanced with action orientation, encouragement of cooperation, good interaction and knowledge-sharing.

Good daily cooperation was underlined as essential for learning. Organisational motivators like social learning systems, encouragement and

supervision but concurrently individual motivators were mentioned. Cross-functional learning and teamwork are challenging especially in larger organisations but also in multilevel and multicultural organisation cultures. What does good daily cooperation then involve according to the participants? The answer is a good but different package of essential drivers of engagement that are differently related to each other in different contexts. Hence, only a dynamic model can explain these 'cause and affect' relationships. This reasoning is supported by studies on employee engagement as a dynamic, reciprocal construct (Xanthopoulou et al. 2009).

2.5.3 Modeling of employee engagement in strategy implementation

A fundamental problem with most classic models is that they are rigid linear and skip the "how" –perspective. However, a dynamic model, which integrates multiple factors, captures better real-life, multi-level challenges in an optimum way, providing ways to see the necessary means for development. With help of the literature and the data such a dynamic model is constructed on the factors related to employees' engagement in strategy implementation, see Figure 2.

FIGURE 2 Dynamic model describing the factors experienced as related to employees' engagement in strategy implementation and the relationships between them

The main idea of the model is not the single elements, but rather the whole, the combination and linkages of them. Action, cooperation, encouragement, support and trust are recognized as fundamental, first order elements to strategy implementation. Important second order elements like interaction, knowledge-sharing, sensemaking link together all the other elements making it possible to learn and engage. Engagement, creativity, organisation culture and combinations of knowledge and competence, processes and people are figured as more complex third order elements, demanding existence of several first and second order factors.

Understanding the "big picture" of the pivotal elements of the phenomenon and the dynamic relationships between the elements show how the model 'works' to create an open, interactive and action-oriented organisation culture. For managers most important is a good cooperation relationship with practitioners based on mutual trust, encouraging and supporting them in the implementation efforts. Continuous interaction, dialogue and sensemaking are needed to build common understanding, learning and competence, engagement and creative organisation culture.

The linkages between the factors are essential to understand the dynamic character of the complex phenomenon. Worthy of note is my choice of having management in the circle as an 'embedded' factor, even though it is the main viewpoint in classic strategic management literature. The model emphasizes rather actions of all members of the organisation and making the managers' role visible in all the other elements from action to support, dialogue and organisation culture. It is clear that managerial activity is significant in motivating employees, even up to the point where you can question if the roles of other practitioner have been properly acknowledged. Instead of direct managerial efforts, it is more important for managers to create conditions for independent work (e.g. Hackman 2011). When the goal is an active dynamic and cooperative strategy work, the role of management is embedded in the actions taken. This view is supported by recent literature of strategy-as-practice on the micro-level and in social learning environments (Vaara & Whittington 2012; Weick 2001).

No one or two factors seem to work alone to create employee engagement and an inspiring organisation culture. The idea of a dynamic, holistic model is supported by several studies. Most strategic management models are linear and focus on structures, or organisational design, neglecting the perceptions of the practitioners. However, there are also dynamic models like Senge's (1990/2006) learning organisation where several important elements influence each other, evolve together to enhance strategic thinking, learning and acting in an organisation. According to Senge such elements are awareness, sensibilities and beliefs building deep learning processes that link individual thinking and acting to organisations' strategic architecture and build little by little a healthy learning culture in an organisation. Nonaka et al.'s (1991, 1994, 2003) knowledge-creation models are dynamic involving transformation of knowledge at explicit and tacit as well as individual and organisational levels

(Dalkir 2011,64-71; Mintzberg et al. 2009, 225-227). Regnér (2008) moreover suggests that linking together several distinct elements of success such as capabilities and individual practices through processes of interaction and activities nourishes creativity and dynamic capabilities generating organisational assets and promoting competitive advantage. Weick and Robert's (1993) 'Collective Mind' is one of the most impressive studies describing this kind of a multilevel phenomenon of reliable organisational performance in a whole body of social action, interaction and sensemaking in a complex, organic system tied together by trust and social learning. An organisation with collective mind values, encourages and supports work and reliable, engaged performance.

2.6 Conclusions

The research contributes to strategic management research by increasing understanding of the drivers of employee's engagement in the strategy implementation. Similar factors are found in literature, yet not much from the employee point of view or linking the factors to the special characteristics of strategy implementation.

The research suggest that in order to understand employee engagement in strategy implementation a dynamic model is needed because the phenomenon is complex, multi-level and reciprocal. The cross-case analysis implies that the most fundamental factors related to employee engagement are rather similar in different kinds of organisations, and all categories of action and interaction are experienced as essential. Interaction links together the other important elements related to engagement. The elements together build the organisation culture in different proportions which encourage the employees' engagement in different ways. The model constituted on the found factors is to be *tested* in practice as action research in the next phases of the research.

The research contributes to practice by giving managers ideas of how to understand, encourage and support employee engagement in strategy implementation as well as the importance of building open culture of interaction and cooperation in strategy work, and thus, increase performance of organisations. Instead of the managerial point of view it would be worthwhile developing the strategy implementation from the employees' angle.

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III

MIDDLE-LEVEL PRACTITIONER'S ROLE IN STRATEGY PROCESS IN INTERNATIONAL ENVIRONMENT

3 MIDDLE-LEVEL PRACTITIONER'S ROLE IN STRATEGY PROCESS IN INTERNATIONAL ENVIRONMENT

ABSTRACT

This essay explores the perceived roles of middle-level practitioners such as middle managers, management assistants, experts and officers in eight organisations' strategy processes in international environment. The empirical data consist of semi-structured interviews and re-written narratives of empowered middle-level practitioners' roles in boundary-spanning strategic positions in strategy implementation processes in demanding transnational settings. Results suggest that even if practitioners still have very traditional formal roles in strategy processes, their actual role in global environment is shaped by frequent interaction in all channels at several organisation levels across organisation borders. The empowered middle-level practitioners manifest as multilevel communicators mediating, translating and explaining the strategy between the organisation units, as knowledge workers formulating and aligning the strategy in local and global settings, and as facilitators helping the processes of learning and adaption of strategy in subsidiary environment. A successive model is constituted in order to show how trust is built through these practices.

Keywords: Middle-level practitioners, Strategy process, Strategy implementation, International environment

3.1 Introduction

Global cooperation in business has become a part of everyday work and employees, teams, and organisations are increasingly operating in different kinds of multicultural contexts. Strategy implementation in global environment means demanding dispersed interaction at local and micro-levels. Still, there is little research on how to engage people in these fragmented, micro-level practices. The international business literature has been more interested in economics, corporate strategy and organisational structures and capabilities at macro-level instead of strategic practices, cooperation and communication of employees implementing the strategy (Kogut 2002). The extant research focuses on managers' challenges and organisational capabilities rather than understanding people when implementing the strategy (e.g. Adler & Bartholomew 1992; Black, Morrison & Gregersen 1999; Morrison 2000). In international environment strategic communication and strategy implementation are especially challenging and require special skills, because of distances, different cultures, markets, laws and regulations, as well as languages and ways of thinking and acting. Implementing strategy in complex transnational environment demands organising structures, systems, processes and operations in a continuous tradeoff between creating global efficiency through centralization or local innovation and flexibility (Collis 2014; Hanna 2014). Managing the knowledge flows and knowledge-sharing in complex dispersed organisational networks with partners and other stakeholders is a challenge (Adler & Bartholomew 1992; Bartlett & Ghoshal 1987; Gupta & Govindarajan 1991; Kogut 2002; Snow, Davison, Snell & Hamrick 1996).

The gap between strategic planning and implementation can grow even deeper in international environment, as the implementation is complicated, waggling between centralization, decentralization and fragmentation. The global business development increases the need for understanding and managing global strategy work across cultures. Tsui, Nifadkar and Ou (2007) analysed 93 empirical studies in international management from 1996 to 2005 and found substantial progress, but also gaps and challenges in research of cross-national and cross-cultural organisational behavior that are manifold greater than the challenges of domestic studies. Tsui (2007) moreover claims international management research is critical in future decades to generate knowledge when operating in global or novel national contexts.

In cross-cultural research there is opportunity and need for deep understanding of contextual characteristics of behavior. The field has much been dominated by Hofstede's models and new ground should be brought (Kirkman, Lowe and Gibson 2006). Noorderhaven and Harzing (2009) claim the research of international business of strategy and management still has challenges in understanding knowledge-sharing in global environment for example between subsidiaries instead of the dominating hierarchical, one-way vertical knowledge-sharing.

In international business research the dominant view of people has been the resource-based view (RBV) (Kogut 2002). However, RBV is a rather stagnant, organisational perspective especially in the dynamic international environment and would thus benefit from extending to dynamic-based views (Clegg et al. 2011, 95-98; Helfat & Peteraf 2003; Regnér 2008; Teece et al. 1997). The activity-based views (Johnson, Melin & Whittington 2003) increase possibilities to understand micro-level activities in global and local strategy implementation. The strategy-as-practice perspective (S-as-P) as being closer to the actual work offers means to interpret the value creating people practices and processes and activating the periphery of organisations (Carter, Clegg & Kornberger 2008; Johnson et al. 2003).

This essay explores in constructivist spirit the roles of middle-level practitioners such as middle managers, assistants, experts and officers in strategy processes in different kinds of organisations in international environment. The research question is: **How is middle-level practitioner's role perceived in organisation's strategy process in international environment?**

At the empirical level I need to understand what kinds of activities the practitioners have in the strategy process, how they communicate with each other, what kinds of meetings they participate in, what kind of information they get and handle, etc. Most essential is to understand how they themselves experience their role and see the possibilities to be more active. Middle-level practitioners are seen as having a distinctive role especially in the implementation processes. Middle managers' roles are essential in conveying the strategy, but practitioners in supporting functions such as management assistants, experts and officers have a similarly strategic position with mediating tasks in between top-management and employees. These practitioners are seen as having valuable skills in communicating, facilitating and organising, and thus potential to develop strategy implementation in organisations.

The research is important because strategy processes in international environment are complex and multifaceted and it is essential to understand the practitioners' role from their point of view on the practical and realistic level. Very few studies have focused on understanding practitioners' roles in strategy processes, as also Mantere (2003) noted, even though practitioners play a key role in the implementation.

3.2 Literature review

The review focuses mainly on strategic and international management literature that is concerned with employees' roles in strategy processes. These traditions overlap each other in many ways and the borders between them are not clear. Perspectives of Strategy-as-Practice, as well as the Learning and Cultural schools of thought in Strategic management research (Mintzberg, Ahlstrand &

Lampel 1998, 2009) and current ideas from organisational psychology are applied to find answers to the research question.

3.2.1 Strategy processes in international environment

In international environment the social and cultural elements of strategy become critical when implementing strategy. That is why the S-as-P view on 'strategy as a social construction and every day practices that form the strategy process' (Carter et al. 2008; Jarzabkowski 2004; Johnson et al. 2003; Regnér 2008) is more apt than the traditional seeing of strategy as a plan, position or a document (Mintzberg et al. 2009). Understanding the organisation's goals similarly is a major challenge in global diverse organisations, and the interaction demands several channels and forums in addition to the top-down communication. Sensegiving and sensemaking activities are central in developing collective understanding of strategy at all levels of the organisation and among the stakeholders (Gioia & Chittipeddi 1991). Intra-firm and inter-unit relationships play an important role when implementing strategies in a global organisation (Bartlett & Ghoshal 1987). However, the headquarters-subsidiary international relationships are still essential in complex multinational organisations (O'Donnell 2000). Most factors that literature has found as constituting a successful strategy process become even more critical in international environment. Clear goals and common understanding of the strategy are the starting point (Hrebiniak 2006; Kaplan & Norton 1996; Yukl & Lepsinger 2007), but far from self-evident in different cultural environments. Equally challenging can be a shared strategic intent (Hamel & Prahalad 1989/2010) and a "glocal" perspective that is being locally responsive and globally efficient (Snow et al. 1996; Collis 2014, 145). Knowledge-sharing requires forums, time and support that are not always easily organised in global environment (Björkman et al. 2004; Davenport & Prusak 1998; Davenport, Prusak & Strong 2008; Seely Brown & Duguid 1991; Wenger 2000).

Strategy processes in international environment are much of *cultural* and *learning* processes. The Learning and Cultural views see the strategy process as a collaborative learning process (Mintzberg 1990; Mintzberg et al. 1998). Knowledge is created and organisational learning generated through social interaction and shared activity (Noorderhaven & Harzing 2009) as well as working through practices and participation (Seely Brown & Duguid 2001). Mintzberg and Westley's (1992) idea of *inductive* learning, as an informal and emergent process at all organisation levels is especially interesting between grassroot and leadership. In international environment this distance can be long. Adler and Bartholomew (1992) identify *synergistic* learning as working with and learning from people from many cultures simultaneously. In subsidiary context, emphasis on corporate driven global integration can even reduce learning, but emphasis on responsiveness, knowledge management and subsidiary autonomy increases it (Zellmer-Bruhn & Gibson 2006). Social learning structures, such as diffusing best practices and developing know-how, global

organisation culture and core competencies have a key role in *transnational* learning (Tregaskis, Edwards, Edwards, Ferner & Marginson 2010). Senge argues (1990/2006) that several important human elements of awareness, sensibilities, beliefs and assumptions build together with established practices *deep learning processes* that link individual thinking and acting to organisations' strategic architecture, building little by little a healthy *learning culture* and *trust* in an organisation. Trust evolves gradually starting between individuals and finally becoming a part of the organisational level actions (Schilke & Cook 2013). These learning and trust creation processes can become critical in diverse global settings.

The Cultural view on strategy processes is similarly concerned with learning but also with cultural diversity relevant in international environment. According to Hofstede, Neuijen, Ohayv & Sanders (1990) most authors seem to agree on organisational culture being holistic, historically determined, related to anthropological concepts, socially constructed, soft and difficult to change. Schein (2010, 18) sees organisational culture as a product of social learning, adaptation and internal integration. Organisation culture in global setting as multidimensional and multifaceted cannot be implemented in a hierarchical process to sub units without considering cultural characteristics. As Schein (2010) points out, strategic change requires developing individual and group behavior in different subcultures and micro-cultures as social processes that take time. Strategy implementation is cooperation where action and interaction constitute the base, and thus the focus should be on the activities of the actors (Carter et al. 2008; Hrebiniak 2006; Weick 2001) appreciating the practitioners as thinking individuals and experts of the work instead of solely operational resources (Mintzberg 1994; Senge 1990/2006; Hrebiniak 2006).

The *context* of international environment where strategy processes are examined takes different forms in concern structures or partner oriented cooperation. The international strategies have according to Collis (2014, 119-151) evolved towards a *transnational* strategy involving continuous transfer of capabilities between each country in a coordinated global network. The term *international* is often, as also in this essay, used as a universal term like 'International business', even though the context today in business is more transnational and *mixed* (Collis 2014, 151) including complex webs of strategic cooperation and less hierarchically structured firms with dispersed power relationships as Adler and Bartholomew defined 1992. However, as Collis (2014, 144-152) points out the primary impediments of transnational strategy are the implementation and the organisation; The vertical structure is clear about organisation structures, authority and responsibility but rigid and not exploiting the capabilities and knowledge in the country units to their full extent, while transnational cooperation at its best is based on dynamic dispersed and flexible efficiency and organised according to *purpose*, *people* and *processes*.

3.2.2 Practitioner's role in strategy process in international environment

In international environment with global and local headquarters and subunits the middle-level practitioners become multilevel *actors* or *agents* having potential to build competitive advantage together. Studying the roles means looking at the practices and perceptions of the *power* practitioners have in strategy processes in multicultural social cooperation (Carter et al. 2008; Jarzabkowski 2004; Johnson et al. 2003; Regnér 2008). Power enables activity, providing individuals with the feeling of significance and competence and enables constituting an active role in strategy work (Knights & Morgan 1991). Spreitzer (1996) and Thomas and Velthouse (1990) see similarly practitioners' active work role related to empowerment with increased intrinsic task motivation and a sense of impact, competence, meaningfulness and choice. Empowerment enhances accordingly the feelings of self-efficacy (Conger & Kanungo 1988) and trust (Zimmerman 2010). In this research I am particularly interested in practices that practitioners have in an empowered championing or citizen positions (Mantere 2003) in successful strategy processes in international environment. Middle managers can have an active and challenging boundary-spanning role in charge of the relevant inter-organisational relationships between the parent company and subsidiary and towards the own organisation (Pappas & Wooldridge 2002, 2007; Schilke & Cook 2013). Similarly, the boundary-spanning relationships between other middle-level practitioners were studied.

Practitioners' engagement and shared comprehension of strategy is not self-evident, and in international environment special focus needs to be put on collective knowledge-sharing and learning processes in multilevel and multicultural relationship networks (Gioia & Chittipeddi 1991; Weick 2000). Encouraging people has major impact on successful performance (Amabile & Kramer 2010) and in particular the superior's encouragement is essential in enhancing motivation, learning and feeling of empowerment (Ikävalko 2005). Knowledge must be *applied* to gain success and thus, learning, motivation and cooperation are needed (Grant 1996; Helfat & Peteraf 2003; Kanter 2000; Teece et al. 1997) across organisations boundaries. Meaningfulness of the work, performance feedback, social support, safety, skills, autonomy and learning are positively associated with work engagement (Bakker 2011; Bakker & Schaufeli 2008; Kahn 1990; Saks 2006; Shuck, Rocco & Albornoz 2010). Work engagement in turn is an important antecedent of successful strategy implementation (Kohtamäki, Kraus, Mäkelä & Rönkkö 2012).

People are essential in international cooperation and strategy implementation. Already Perlmutter (1969) emphasized the human resource dimension to understanding a firm's orientation towards world markets, and the HR role has been emphasized in global context also thereafter (e.g. Adler & Bartholomew 1992; Morrison 2000; Snow et al. 1996). Ulrich, Brockbank and Johnson (2009) emphasize alongside with HR processes, the employees' central roles in strategy work. The literature on strategic international human resource

management (SIHRM) has tried to find integrative models between human resource management and strategy, aiming at understanding how multinational enterprises can operate more effectively (Schuler, Dowling & De Cieri 1993; Taylor, Beechler, & Napier 1996). However, the research of strategy and HRM have continued rather separately without benefiting from each other, and instead of strategy, the international HRM has concentrated on staffing, selection and management of expatriates (Boxall & Purcell 2008, viii – ix, 253). The main focus of international strategy has been on macro-processes of multinational corporations (MNC) (Björkman, Barner-Rasmussen & Li Li 2004; Ghoshal & Bartlett 1990; Gupta & Govindarajan 1991; Kogut 2002). Most international business research employs the general communication theoretical 'sender-receiver' model that offers a limited tool to understand the interaction in the multilevel relationships (Noorderhaven & Harzing 2009) and there are only few in-depth empirical studies on operations of multinational corporations at micro-level (Kogut 2002).

3.3 Methods

The essay explores empirical data collected applying Yin's (2009) multiple case study design. The reality in organisations has been studied with a clear focus on the research question, conducting open-themed interviews to get an objective view of strategy processes and practices for inductive analysis (Eisenhardt 1989). The analysis is qualitative aiming at interpreting the phenomenon and constructs of people holistically and profoundly in real life rich context (Piekkari & Welch 2011) understanding the cases and perceived practitioner's roles in their uniqueness Stake (1995).

The cases were chosen to be theoretically and generally interesting for the research question in international environment according to Eisenhardt's suggestions (1989). The interviewees were carefully selected so that they were both managers and practitioners in particular from the middle-level of the organisation and had a good picture of the strategy work in practice in international cooperation. Interviews were conducted with constructivist intent, appreciating the practitioners as part of the world they described, focusing on the social processes and actions by asking them *what* and *how* (Charmaz 2006; Silverman 2001). The interviews proceeded in the order the practitioners felt they wanted to tell about how they worked and interacted with each other and how they perceived their roles in the processes.

Interpretive inductive reasoning was applied when analysing the multi-dimensional data, coding, categorizing and comparing. The practitioners' expressed perceptions were additionally examined in form of re-written narratives. The results were compared with previous research conducted for comparable purposes. A holistic, phased model of strategy implementation and

trust creation in international environment was constituted linking together the organisational and individual levels of interaction.

3.4 Results

In this section I first present the organisations and the participants in Table 7. In the first round of analysis I attempted to interpret the context of strategy work in the cases and the organisations' formal and informal structures between the parent company and subsidiary and cooperation relationships as the participants explained them. In the second round of analysis I examined the practitioners' practices and perceived roles in strategy work. The emerging boundary-spanning activities of middle-level practitioners when implementing the strategy were studied in more detail through rewriting their narratives. Drawing on the empirical findings and literature a model was constituted to show how organisation level trust is created and the implementation facilitated through the practitioner's practices.

TABLE 7 The studied organisations and the participants

Organisation	Participants
1 Middle-sized private sales company with c. 400 employees in Finland, headquarters in Europe. Part of global seller of consumer and professional products and solutions	Development Director, **Marketing communicator**, HR Specialist
2 Small Finnish private owned non-profit foundation with 70 employees and a clear global mission, operations globally	CEO, **Office Manager**
3 Large global concern with HQ in Europe and subsidiary in Finland	Development and Communications Directors, **Communication Specialist**, five Management Assistants
4 Large, Finnish traditional seller of consumer goods, about 3000 employees, the export unit and subsidiary having about 300 employees in Russia	Export Director in the parent company, CEO Executive Assistant in parent company, CEO and **managers of marketing, logistics and administration in the subsidiary**
5 Middle-sized multicultural northern European sales concern's headquarters with nearly 200 employees with parent company in Europe, part of a global group manufacturing and selling durable consumer products	Strategic manager and **CEO Executive Assistant, HR Coordinator**, survey of middle managers and practitioners, 57 respondents out of 160
6 Large subsidiary in financial sector with 2000 employees in Finland, Northern European headquarters with c. 20 000 employees globally	**Management assistant** in the Finnish subsidiary
7 Large concern in construction and renovation with 50 000 employees globally, headquarters in Finland	**HR manager** responsible to HR director. CFO's presentation of strategy processes
8 Small Finnish producer and seller of consumer products with 60 employees globally	**North American Sales Manager, HR manager**

3.4.1 The context of strategy work in the case organisations

In all the cases the strategy or the guidelines to strategy came from the parent company. The importance of the local sensemaking was emphasized. The strategic communication was active in large concerns cross-nationally between parent companies and subsidiaries involving several levels of practitioners. In small organisations the interaction to field workers globally and back to the headquarters was frequent employing the supporting functions. The large organisations had according to Collis' (2014) definitions *mixed multicultural* and *transnational* strategies with strong parent company strategy with top-down implementation but frequent, dialogical discussion cultures. The small organisations in turn succeeded well with 'glocal' strategy. The organisations were different and how the strategy was applied varied but the communication was perceived as equally important in all case organisations.

Organisation *1* had a rather multicultural strategy in strong parent company lead with features of transnational communication. The guidelines to strategy came from the headquarters in Europe and the country strategy was formulated with extended management that is with all middle managers and heads of supporting functions. All personnel took part in action planning in workshops and cross-functional meetings. The dialogical communication efforts had been increased during the last years. Accordingly, the results were enhanced and employees committed and satisfied, but still the common understanding of the strategy was experienced as a challenge.

> "We get quite a lot of bureaucracy from the parent company, but the daily cooperation and trust in relationships make you strong." (Marketing coordinator, Org 1)

In *organisation 2* the biggest challenge was that the employees worked very independently and isolated in the field work in often difficult circumstances around the world. The personnel were very diverse with twenty different nationalities. In addition to a clear mission, they needed a clear strategy and good communication with the parent organisation. Their link to the head office was the office manager in Finland.

> "Even a smaller detail can feel big when you have travelled in three weeks and are stuck somewhere. I have said that if you have any trouble you can call me any time." (Office manager, Org 2)

> "Multiculturalism is a wonderful asset but then you need to be aware of the differences, especially for the superiors" (Office manager, Org 2)

Organisation 3 got the strategy from the HQ in Europe. There was not much discussion about it at practitioner level between the HQ and the subsidiary, instead, the strategy was assessed and applied rather independently in the subsidiary. The concern strategy can according to Collis' (2014) definitions be characterized as mixed with effective multicultural top-down strategy implementation but transnational knowledge-sharing and exploitation.

> "We are a very parent company driven unit, the group makes the strategy for five years at a time and there is not much participation from the countries, not what I know at least." (Communications Specialist, org 3)

Organisation 4 is strongly owner-driven, and even though the cultural differences are taken account of, the strategy is rather determinant not genuinely transnational. The organisation is a multilevel and rather bureaucratic matrix with traditional top down strategy work and well-established processes. The Finnish parent company had a relatively open discussion culture between employees and managers, sharing knowledge through daily work, whilst in the Russian subsidiary the managers' roles were more authoritarian. The interaction between parent company and subsidiary was frequent, practical and appreciated, but in the Russian subsidiary it was experienced that the parent company managers did not really understand the Russian market and that the strategy did not pay enough attention to the local market.

> "Organisations' identities and ways of working are different. We have not tried to unify the functions, but have let all the flowers bloom. In strategy work we have however unified practices." (Export Director, parent company, Org 4)

> "The cooperation with parent company is like a 'ping pong effect', back and forth at all organisation levels, there are no cultural differences in strategy work, the markets and customers instead are totally different. The cooperation is otherwise good, but sometimes it annoys that the parent company managers think they know the market better than we do." (Middle manager, foreign subsidiary, Org 4)

> "The strategy in subsidiary is uncertain, as it depends on the parent company situation". (Middle manager, foreign subsidiary, Org 4)

Organisation 5 got the strategy from HQ in Europe, but the discussion was open, dynamic and regular between the organisations. The dialogue between country units and the European bureaucracy were experienced as major challenges in development. Diversity was respected and the multiculturalism perceived both as a privilege and a challenge. The personnel and the organisation culture were young. Middle managers' roles were experienced as essential in strategy implementation. However, more interaction and cooperation with own superior was wanted.

> "The strategy process starts in the Japanese way in the beginning of April, when the strategic goals are presented." (Middle manager, Org 5)

> "Our organisation is multinational and multicultural, it's not a problem but intensive, everyday cooperation. Cultural differences are not a problem but rather the personal chemistries and practicalities, different laws, currencies and languages". (Executive Assistant, Org 5)

> "All strategic information must be translated. There is quite a lot of information and an overflow is a risk. You need to be able to prioritize, schedule, organise!" (Executive Assistant, Org 5)

In *organisation 6* the interaction on the strategy was frequent and informal, even though the global strategy was formulated in the headquarters. The strategy culture can thus be characterized as mixed.

> "All strategy discussion here and in the area offices is translated and sent to the headquarters. They come really often from the headquarters and take part in the discussions, especially if we work for example on a big customer". (Management Assistant, Org 6)

Organisation 7 had succeeded well globally with mixed multicultural and transnational strategy but the local interaction globally, i.e. the 'glocal' interaction, was experienced as challenging because of the strong people orientation of the business.

> "The renovation business is really fragmented, it's about working with people locally. Interaction with local teams and partners worldwide is challenging, that is why a common vision and employee engagement are so essential." (CFO, Org 7)

Organisation 8 had an effective, non-bureaucratic small organisation globally. The Northern American market was covered successfully with only a handful engaged practitioners. The organisation had a clear, common strategy that was applied very flexibly taking account of the local environments' needs globally.

> "Strategy work is not hierarchical but constant communication and every day work" (Sales manager, Org 8)

> "Encouraging people to work according to the strategy and rewarding for doing it is really important. Skillful and engaged employees are committed" (HR manager, Org 8, HQ)

The interaction in strategy work in international environment is described in Table 8. Because the interview format was open-ended, the presentations reflect the issues that were mentioned as the most important, and cannot thus be compared by every detail. The open discussion culture was emphasized more in the organisations in international environment, than in the cases in the whole project material.

It seems, like Bartlett and Ghoshal (1987), Gupta and Govindarajan (1991) and Malnight (2001) suggest that in many of these organisations integrated multidimensional network complexity was increased internally in order to respond to the global competitive environment. The transnationally active organisations seemed to create and coordinate strategic knowledge in dynamic practice-based social networks increasing the innovative potential as Seely Brown and Duguid (2001) describe. In these case organisations, the differences between subsidiary nationality did not seem to influence the patterns of knowledge flows, as also Björkman and al. (2004) noticed in their study of knowledge transfer in MNC:s.

TABLE 8 Interaction in strategy work in the case organisations.

Organisation	Interaction in strategy work in focal organisation and in international environment
1 Middle-sized sales company with headquarters in Europe. Part of a global seller	Top, key account and sales management update strategic guidelines with help of market and client analyses and the guidelines from HQ in Europe. Global cooperation is basis in all work. Strategy is communicated in CEO presentations once a month, in teams with the superiors once a week. Discussion is continuous with Europe. Action plan in focal organisation is formulated cooperatively with all personnel in workshops. Implementation is monitored with help of indicators followed every week, sales results available on-line to all organisation
2 Small Finnish non-profit foundation, operations globally	Managers and board of directors stand for the strategy. Middle managers' discussion forum is really important. An informal forum with CEO, Finance manager and Office Manager together is an important link to the board of directors. Personnel in the field have very independent roles in demanding circumstances. Office Manager has a supporting and facilitating function concerning whole organisation.
3 Large, global concern in automation technology, HQ in Europe and subsidiary in Finland	Strategy comes from HQ in Europe and is assessed and applied in Finland according to the special needs on the market. The communication between HQ and subsidiary is multilevel, frequent and practical. The subsidiary role is independent and mutual trust and confidence is experienced as good.
4 Large seller of consumer goods, parent company in Finland, subsidiary in Russia	Strategy comes mainly from owners and board of directors of parent company, strategic discussion in parent organisation is open and action oriented, in Russian subsidiary more authoritarian. Strategy implementation according to management books. Cooperation is good on manager and middle manager levels between parent and subsidiary organisations. No cultural differences are perceived in strategy work, Finnish way of business is appreciated. HQ appreciates local ways of work, still in subsidiary more independence is wanted in market operations.
5 Middle-sized multicultural Northern European sales concern's headquarters with parent company in	Multicultural way of working. Job rotation in Europe and globally. Global Strategy is formulated in cooperation with Japanese and European organisations. Northern European strategy is formulated together with HQ in Europe. Personnel in 7 countries can take part in strategic discussion from the beginning of the process, communication culture is active and commitment high. F–to-f discussion is appreciated in global communication. Middle managers' role is important in the implementation. Knowledge-sharing is encouraged.
6 Large subsidiary in financial sector in Finland, Northern European headquarters part of a global group	Strategy comes from Northern European parent company, is presented in subsidiary, actively discussed and assessed how it can be applied locally. Suggestions are made to HQ to develop the strategy. Middle managers have big role in implementation in whole country organisation. Local workshops are held with whole personnel. Discussion is active between HQ and subsidiary.

(continues)

TABLE 8 (continues)

7 Large, global concern in construction and renovation, headquarters in Finland	Active strategy work and cooperation globally and locally are emphasized. Clear goals, common targets, rewarding accordingly. Every unit has own action plan. CEO takes part in strategic discussion with whole personnel. Implementation plan is elaborated with whole personnel, is found in Intra and part of every-day work. Interaction with global partners locally is perceived as challenging.
8 Small Finnish producer and seller of consumer product globally	The base for strategy is rather stable, formulated with CEO, owners and sales manager in Finland. Strategy work on daily basis is active, dynamic and market oriented in small effective teams, concrete local action plans, good cooperation in the field. In small company everybody does everything, Passion, engagement and independence in global environment is high. Still, HQ support in strategy implementation is perceived to be important.

3.4.2 Practitioners' roles in strategy work

Even though strategy work was perceived as managers' and owners' job in all case organisations the practitioners were given a chance to comment on the strategy before the decisions were made in small and middle-sized organisations even if the guidelines to strategy came from the headquarters. Instead, the practitioners had an active planning role in the strategic actions to be taken and important practices facilitating the strategy events.

> "We have 'reflecting days' where we think what everybody's role is in the strategy. Every employee's opinion is important. We then continue the discussion in personnel meetings and send ideas back and forth, pick up from there. I then gather and translate it all to the parent country." (Management assistant, Org 6).

The practitioners perceived the strategy launching, top management road shows and visits of management from headquarters in subsidiaries as essential for the strategic *intent* underlined by Hamel and Prahalad (1989/2010). The cross-functional and cultural cooperation were emphasized. In transnational organisations the global cooperation was experienced as the basis in all work and it was paid attention to from job interview and recruitment. Effective communication distribution was stressed more than in domestic contexts and several information channels were used. Attention was paid to supporting the middle managers in conveying the strategy. Systematic, action oriented and effective one-way information was perceived as important but the dialogical or informal interaction was seen as more essential.

> "Strategy work is also brainstorming and playing with ideas. Markets develop quickly and strategy work needs to be dynamic and vivid. Frequent communication with the parent country is essential" (Sales manager, Org 8)

The practitioners appreciated interaction and dialogue equally in all cases. Only managers and members participating in the work of the executive team were

satisfied with the *extent* of the knowledge-sharing. Sensemaking takes more time than one PowerPoint presentation or an all employee kick-off. Instead, constant discussions of what strategy means in the own team or for the personal tasks were wanted. This kind of a daily dialogue was more usual in international than domestic environment. Similarly, the importance of a wide range of informal interaction, both vertical and lateral has been shown in in international business research by for example Bartlett and Ghoshal (1987) and Noorderhaver and Harzing (2004), as well as by s-as-p researchers.

3.4.3 Boundary-spanning roles of middle-level practitioners

According to Pappas and Wooldridge (2002, 2007) strategically active middle managers are well positioned having boundary-spanning roles in the organisational network of relationships. Managers in the foreign subsidiary in organisation 4, and in the small organisations had this kind of an active role and position towards the parent company and own organisation. However, in these data the other middle-level practitioners' roles could be even more boundary-spanning while middle managers' roles were more intra-organisational. Practitioners in supporting functions in particular management assistants had active boundary-spanning roles communicating in tandem towards and between both the headquarters and the subsidiary units and coordinating the strategic communication in this web of networks. Officially the links were through their superiors but in practice they had independent tasks and a sovereign, empowered position between management, employees and multidimensional networks. They clearly enjoyed working in the transnational context, were committed to their work and actively used their comprehensive communication skills to facilitate managers' work, knowledge-sharing up and down in the organisation and the implementation of strategy.

> "I am a multilevel interpreter having the big picture and managing the networks down to the doormen and cleaners, all intern strategic communication passes through me, I cooperate with the regional offices, explain the strategy on practical level to them and convey their ideas back to the parent company. (Management Assistant, Org 6)

HR officers in these data had a rather narrow scope of intern tasks (HR Specialist in Org 1 and HR Coordinator in Org 5), far from being an 'HR Business Partners', while the interviewed HR managers (Org 7 and 8) had a wide scope of tasks in strategy work also internationally. Even if middle-level officers and specialists in HR, marketing and communications had mainly local tasks they cooperated and shared knowledge in transnational teams in their organisation. They could have a comprehensive network within the concern being able to use their expertize to facilitate the implementation of the global strategy in local environment. Transnational cooperation and knowledge-sharing can indeed enhance global efficiency, local responsibility and organisational learning, but simultaneously they require communication systems that enable geographically dispersed employees to communicate in the

multilevel networks as also Snow et al. (1996) and Björkman et al. (2004) claim. Seely Brown and Duguid (2001) in turn state that sharing practices enhance sharing know *how* and thus, tacit knowledge.

> "Our team is transnational, we cooperate intensively and have video meetings every second week. On the basis of this, I plan and organise independently information and well-being events in our regional offices". (HR Coordinator, Org 5)

> "My main task is to convey and communicate the parent company strategy in the country organisation and in our global business unit. It means multilevel forums and channels, more conventional, social media and f-to-f." (Communication Specialist, Org 3).

The new ways and channels of cooperation and interaction are rapidly increasing in global context offering interesting possibilities to develop employee's role strategy work. This development demands understanding of micro-level actions, and thus, engagement of employees at all organisation levels.

In this essay I examine in more detail four middle-level practitioners' with important boundary-spanning roles in strategy implementation in international context: 1). 'Anna', office manager in a non-profit organisation with about 70 employees working globally in the field, 2). 'Sheila', communications specialist in a large global concern, 3). 'Ekaterina', middle manager in Russian subsidiary to a Finnish concern and 4). 'Susy', management assistant in a Finnish subsidiary to a Northern European concern. I chose these practitioners' roles on qualitative grounds to be studied because they were especially interesting from the perspective of strategy implementation and their boundary-spanning tasks in strategy work (Pappas & Wooldridge's 2002, 2007).

1). 'Anna' worked as office manager in a small Finnish non-profit organisation with a global mission. Her main task was supporting the personnel working all around the world in challenging circumstances. She had contact to all personnel through her HR tasks including recruiting, induction and training. Anna's contact network was highly transnational including locally all the relevant decision making organs of the organisation; she was secretary in the board meeting, planning the agenda with the director of finance and administration and the executive director. She cooperated with the executive team making propositions and implementing the decisions, similarly she participated in the informal middle manager program development forum. Additionally, she had contact with strategic external partners and stakeholders such as Ministries and the Office of the President of Finland. Hence, Anna's network covered contacts up, down and out of the organisation globally. She was a natural contact to all personnel around the world, and could mediate the experiences from the field to the decision making organs and vice versa, help and support people when implementing the strategy of the organisation in global setting.

Her role was especially fruitful for helping the strategy implementation because she knew the targets, the work, the people and the organisation.

2). 'Sheila', worked as communications specialist in a Finnish subsidiary of a large global concern. The whole organisation as also her position in the organisation was highly transnational; she worked in the country organisation's communication team but served simultaneously the needs of the internal customers both in the Finnish organisation and globally in the business unit. In her work she needed to know the strategy, the organisation, the business and the products and to manage larger entities reaching out across unit and country borders. Sheila experienced her role and reason for work was to mediate the concern's strategy through writing in the different channels of the organisation from print to social media in order to help the implementation of the strategy. Change of strategy meant new priorities and learning for the organisation. The strategy was communicated like a cascade from the top down in the whole organisation. Top management presented the strategy to all units and stakeholders. The unit directors in turn conveyed the strategy forward in their organisations. The communication team supported this process. The new guidelines, what they meant for the Finnish organisation and how they should be implemented were made sense of in the communication team in several occasions when getting knowledge from the headquarters in pieces. In her work the awareness of strategy was behind all her actions, and the strategy formulated her daily tasks and yearly schedule. She searched for experiences of successful strategy implementation in the units and told these stories to whole personnel using her writing and journalistic skills. Through these activities she could influence people's thinking, increase the common understanding of strategy and thus, be part of the success story in the global organisation.

3). 'Ekaterina', was marketing manager in a Russian subsidiary to a Finnish concern. From the subsidiary point of view she was part of top-management, but from the concern perspective the members of the subsidiary executive team had more middle manager roles because the organisation was strongly parent company driven and could be characterized as a rather vertical multinational. Ekaterina had a daily cooperation relationship with the parent company in Finland but at the same time she had power to execute the parent company strategy in the local setting. She had thus an active boundary-spanning communicative role between the parent company, the local subsidiary and the large markets and customers in Russia. She communicated frequently in the daily cooperation with her counterparts in the headquarters' marketing, sales and product development, as well as with her own team, organisation and customers. She could contribute significantly to the

implementation of the concern strategy and experienced also respect for the parent company strategy work and great engagement in her work.

4). 'Susy' worked as management assistant with the executive team and the board of directors at the Finnish subsidiary in a large concern in financial sector and headquarters in Northern Europe. The concern had operations globally. Susy's unit for business customer services was responsible for strategy implementation actions with 300 hundred practitioners in Finland. The discussion was active between HQ and subsidiary and the HQ managers visited regularly the subsidiary and took part in the local discussion. Susy's role in strategy work included organising and facilitating the work of the executive team and projects. She scheduled, organised, prepared and facilitated strategic meetings and events in the organisation, between the offices, for the executive team, board of directors and the personnel. Daily tasks meant being the 'time manager', 'call center', 'travel manager' and 'help desk'. The HR tasks included for example planning and organising training for personnel. The strategy came from the Northern European parent company and all subunits followed this concern strategy. However, in practice the strategy was completed locally. The implementation started with a kick-off and presentation of the strategy in the subsidiary. The local applicability of the strategy was actively discussed and assessed in the executive team and workshops with whole personnel in the area units. Susy organised and participated in the strategy workshops for both the executive team and the personnel. She documented, compiled and translated the development ideas to the HQ and after getting feedback from there, back to the unit offices and in the intranet. In the unit offices the middle managers had a big role in the implementation in the whole country organisation. It was important that every employee understood the strategy for unit characteristic way. Susy had care of the internal strategy communication and she felt she was an interpreter between the groups, translating and explaining the meaning of the strategy in the organisation and between the headquarters and the area units. Susy's attitude was to help everywhere she could and proactively take care of all tasks. She thought it was important to have 'the big picture' and manage all the networks in the organisation.

Taken together the middle-level practitioners played an essential role mediating the stategy between the organisation units and facilitating the implementation of the strategy in daily cooperation, supporting the employees' creativity to understand the strategy in their own work and thus, develop the organisation's competitive advantage together as Carter et. al (2008) and Regnér (2008) suggest. As Seely Brown and Duguid (2001) argue they coordinatine knowledge and practice in a dynamic process in horizontal, practical networks reaching far

beyond the boundaries of the hierarchical and vertically integrated organisations.

3.5 Modeling of the middle-level practitioner's role as part of organisational strategy implementation in international context

For the modeling of the middle-level practitioner's perceived role in strategy process in international environment I examined practitioners' activities in the processes in the spirit of the practice perspective. According to the empirical findings the practitioners' practices when implementing strategy mainly involved social interaction and knowledge-sharing in own organisation and between the headquarters, country units, local offices and fieldworkers in order to support the strategy implementation. This conclusion is supported by Noorderhaven and Harzing's (2009), Snow et al.'s (1996), Tregaskis et al.'s (2010) findings of the relevance of frequent both formal and in particular informal interaction and geographically dispersed strategic learning and knowledge processes. The cross-national and cultural cooperation demands communications skills that the supporting practitioners have and understanding diversity in working context. Building common understanding and trust in multicultural context is a learning process starting from individual level and evolving only gradually and supported to organisational cooperation. In these processes boundary spanning individuals have an exceptionally relevant role as also Seely Brown and Duguid (2001), Schilke and Cook (2013) and Snow et al 1996) state.

Practices related to interaction thus constitute the base for the modeling and accordingly, the practitioners' roles manifest as *multilevel communicators* communicating the global and local strategy message, as *knowledge workers* sharing, translating, explaining and formulating the strategy contents to management and personnel and other stakeholders, to intranet, management meetings and all employee workshops and as *facilitators of strategy implementation* telling and explaining the strategy story and helping the personnel to understand the strategy in their own work.

The individual and social learning processes involve interaction, adaption and integration (Schein 2010, 18), but also human experience such as awareness and sensibilities, beliefs and assumptions, as Senge states (1990/2006). The cooperation culture develops only little by little through these processes as trust grows in the organisation, linking the individual actions to organisations' strategic activities (Schilke & Cook 2013). Schilke and Cook (2013) propose a theoretical model that elucidates how common understanding and trust evolves in inter-organisational relationships at individual and organisational level. As common understanding and trust shape the basis of strategy implementation

especially in international environment, Schilke and Cook's (2013) model can be applied to understand the processes also in this research, see Figure 3.

The *initiation* stage of the process is launching of the corporate strategy or strategic guidelines on organisational level. Schilke and Cook (2013) argue, that a boundary spanner is the starting point of the process gathering information and communicating with own level individual counterpart in the partner organisation. According to my empirical material the boundary spanner mediates the information in the own organisation through local knowledge-sharing, sensemaking or story telling at individual, group and organisational level. A management assistant for example translates and communicates the strategic information via the organisation's intranet or organises an all-employee meeting, independently or in cooperation with the managers. In addition to these organisational activities the assistants interpret the strategy message between management and personnel explaining and translating the management jargon to ordinary practical knowledge. This phase results to individual reflecting of the applicability of the strategy in employees' own tasks and could, with Schilke and Cook's terms be called the *negotiation* phase.

During the *formation* phase the local and global knowledge are integrated between the organisations. The boundary spanner mediates the results of the own organisation's sensemaking to the parent company and respectively, the parent company feedback to the own organisation. At individual level the organisation members are expected to accept the discussed strategy and learn through knowledge-sharing what the strategy means in practice. In the *operation* phase the strategies are implemented. Through individual interaction and cooperation the individuals learn and hence, the organisations learn. The process is visualized in Figure 3.

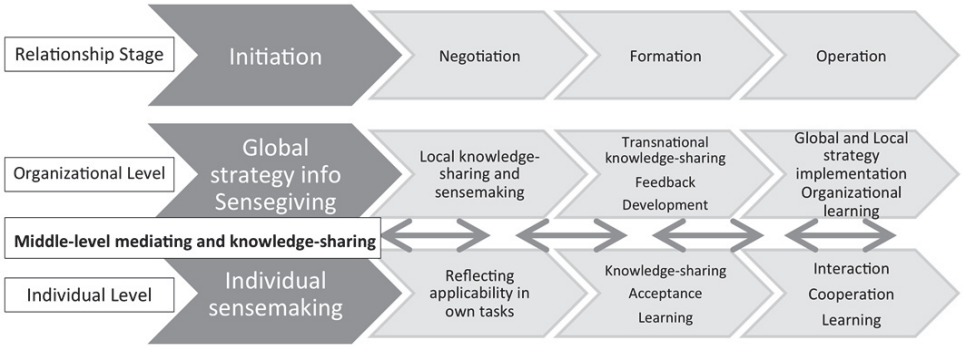

FIGURE 3 Trust formation in strategy implementation in international environment applying Schilke and Cook (2013)

3.6 Conclusions and evaluation

The research contributes to strategic management research by adding to the knowledge of middle-level practitioner's role and micro-level practices in strategy processes. The essay highlights the practitioners' roles in organisations' strategy processes in international environment as multi-level communicators, boundary-spanners and supporters of strategy implementation through increasing the common understanding of strategy, organisational learning and trust creation in demanding transnational settings. The practitioners' role is moreover essential in knowledge sharing and creating processes in particular at intra but also inter organisation relationships.

The practical implication of the results is helping managers understand how to develop the processes of communication when implementing strategy and increase learning and trust building in the messy realities of organisations with global and local, vertical and horizontal relationships and cultural differences in international environment. The research is limited to eight organisations strategy processes and 12 practitioners' roles. Thus, more both empirical and conceptual research on employees' roles in strategy processes is needed as the perspective is only beginning to emerge in the field of strategic management.

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IV

DEVELOPING STRATEGY IMPLEMENTATION AND EMPLOYEES' ENGAGEMENT IN CROSS-FUNCTIONAL COOPERATION IN SALES AND SERVICE - ACTION RESEARCH IN A MULTINATIONAL HEADQUARTERS

4 DEVELOPING STRATEGY IMPLEMENTATION AND EMPLOYEES' ENGAGEMENT IN CROSS-FUNCTIONAL COOPERATION IN SALES AND SERVICE - ACTION RESEARCH IN A MULTINATIONAL HEADQUARTERS

ABSTRACT

The purpose of the essay is to examine implementation of a strategic cross-functional cooperation project and the employees', more precisely, middle-level practitioners', engagement in it. The applied method is participatory and collaborative action research with constructivist intent. Longitudinal action research at micro-level contributes to strategic management research highlighting the possibilities to understand and develop practitioner's engagement in strategy implementation processes in a for theory and practice interesting case of a multinational headquarters' cross-functional cooperation in sales environment. The research recognizes several elements that both enhance and impede strategy implementation in a demanding real life situation. The results suggest that only a dynamic model based on the most essential elements of action and interaction in the working community can describe successful implementation activities and practitioners' engagement in them. Most important for managers is to encourage and empower the practitioners in the implementing activities.

Keywords: Action research, Cross-functional cooperation, Sales and service, Strategy implementation, Employee engagement

4.1 Introduction

Strategy implementation remains the biggest challenge in strategic management. It is well documented during the last decades that strategy implementation often fails (Balogun & Johnson 2005; Bourgeois & Brodwin 1984; Hrebiniak 2006; Kaplan & Norton 1996, 2008; Mintzberg 1994; Nutt 1999). The implementation of strategies is especially difficult in cross-functional cooperation as the working cultures can be very different. The practitioners and customers' point of view is essential in order to offer products and services flexibly and effectively despite of functional department borders. However, the mainstream strategic management research has not much addressed micro-level practices and processes on how to manage strategy implementation together with the practitioners in cross-functional cooperation.

Research recognizes the importance of sensemaking in the implementation processes and middle manager's key role in conveying the strategy to employees (Balogun & Johnson 2005; Floyd & Wooldridge 1992; Gioia & Chittipeddi 1991; Ikävalko 2005; Rouleau 2005; Weick 2001; Westley 1990; Wooldridge, Schmid & Floyd 2008). Sensemaking is still only the first step and does not as such lead to action or guarantee a successful implementation as also Mintzberg (1994), Stensaker, Falkenberg and Grönhaug (2008) state. Managers' responsibility and commitment in implementation activities is essential but also the engagement of employees and understanding their embedded agency in strategy processes in the organisations (Floyd, Cornelissen, Wright & Delios 2011).

Hence, there is call for more practice and action based research (Johnson et al. 2003; Whittington 2006) and research on organisational actors beyond managerial ranks (Vaara & Whittington 2012) in order to understand the micro level challenges of strategy implementation in organisations. The context of sales and service is especially relevant in strategic management research because it represents the core of business and links with all organisational functions.

The purpose of the essay is to understand one strategy implementation process and the practitioners' engagement in real life context of sales and service in strategic cross-functional cooperation. The research examines a change process in a Nordic European headquarters of a global company and seeks ways to improve the implementation especially from the 'people' point of view. The researcher planned the cooperation project together with the practitioners according to the strategic guidelines of the organisation's top management and took part in the implementation process. The essay attempts to develop strategy implementation in cross-functional cooperation in sales and service and add to the body of knowledge of practitioners' activity in strategy implementation in sales context. The research question is **"How can the implementation of a strategic cross-functional cooperation project and the employees' activity in it be improved?"**

4.2 Implementing strategy in B-to-B sales context

With strategy implementation is meant everyday practices, tasks and routines people do to put strategy into action, applying the Strategy-as-Practice (S-as-P or SAP) view of strategy as 'something people do" (Carter, Clegg & Kornberger 2008, Jarzabkowski & Spee 2009, Johnson et al. 2003, Regnér 2008). Strategy work is stated as everybody's work in the organisation comprising practices from strategic planning, communicating, implementing to reviewing strategy. Yet, the main focus is on implementation, where the employees' role is most important. It is implied as Mintzberg (1995), Senge (1990/2006) and Hrebiniak (2006), Weick (2001) claim that thinking cannot be separated from doing.

Of strategic actors the main focus is on the middle-level practitioners such as middle managers, assistants, officers and experts. The practitioners' engagement is seen as organisation psychologists Schaufeli, Salanova, Gonzalez-Romá and Bakker (2002) and Bakker (2011) define it as an active, positive state that is characterized with vigor meaning high level of activity and energy, dedication referring to enthusiasm, challenge, significance, meaningfulness and strong involvement and absorption characterized as being fully concentrated on and happily engrossed in work so that time passes quickly.

Practitioners' micro-level activities are key issues in strategic processes (Johnson et al. 2003; Weick, Sutcliffe & Obsterfield 2005) and practitioners are strategic actors having an important role in 'making, shaping and executing' strategies (Whittington 2006). Knights & Morgan (1991) claim that productive power increases individuals' well-being, sense of meaning, identity and reality. Power seen in Foucaultian way existing in action, interwoven in social relationships and linked to knowledge (Foucault 1977; Knights and Morgan 1991) is closely related to engagement, in particular the elements of vigor and dedication. I argue that people need to be given the power to implement the strategy in the organisation's social network, and thus, provide them with the feeling of significance and competence which makes it possible for them to engage and constitute an active role in strategy work.

The context of this research is cross-functional cooperation in sales and service. 'Sales' refers in this essay mainly to Business-to-Business (B-to-B) sales. Service is mainly seen according to service-dominant logic as value creation constituting the core concept and replacing both goods and services. Plural form 'services' applies for different perspectives depending on if we talk about things or activities (Gummesson 2007). Important activities for this chosen case and relevant in sales and marketing context also more generally are partner relationship management, branding, service and experiential marketing, co-creation of value, cross-functional and integrated cooperation and communication (Gummesson 2007; Kotler 2004; Kotler & Pfoertsch 2007; Prahalad & Ramaswamy 2004). Gummesson (2007) defines relationship marketing as interaction in networks of relationships and 'many-to-many

marketing'. According to Kotler and Pfoertsch (2007) relationship marketing and branding are challenges to many especially B-to-B companies, because B-to-B world is traditionally seen as a rational, unemotional specialty market. The change of focus from traditional sales and marketing to relationship management demands change in mindset from short-term customer needs to long-term value creation and maintaining of customer relationships, as well as a mindset of focus from individual selling to team work, developing leadership and conflict management skills (Weitz & Bradford 1999). Still, brands are increasingly important to all markets, because of the explosion of choices, suppliers, information and details on most areas. Branding requires the work of all personnel starting with the CEO, a holistic approach and a strategic perspective covering everything from the development and design to the implantation of marketing, programs, processes and activities. According to Kotler and Pfoertsch (2007) the change pays off and correlates positively with stock increase. The demand of co-created customer experience is increasing on many markets. Creating value interactively in cooperation requires a strategic change towards a more participatory and interactive culture and business model (Järventie-Thesleff, Villi, Könkkölä & Moisander 2011).

From the customers' point of view functions of an organisation should work well together over all department borders to guarantee good quality, good combination of products and services and a fast turnaround. Many companies attempt to combine products and services to captive product packages that engage the customer in the long run. The challenge with this 'packaging' is that it usually requires cross-functional cooperation within companies which tends to be difficult because of different working cultures. Classic are the challenges in cooperation between sales and marketing (Kotler, Rackham & Krishnaswamy 2009). According to them cooperation is usually natural in small companies and the role of marketing is to support sales but especially in bigger companies, sales and marketing develop in different directions and economical and cultural frictions occur. The same goes with sales and service; they would naturally support each other but the bigger the organisation the more silo structures tend to block the cooperation.

4.3 Methods

The research is a single case study in a medium sized Northern European headquarters (HQ) with subsidiaries in Scandinavia and Baltic. The case was chosen to be relevant and of general interest for the research topic and building theory grounded in empirical reality (Eisenhardt 1989; Eisenhardt & Graebner 2007; Stake 1995; Yin 2009). Real business case study is more particularization than generalization and gains reliability through a better understanding and a more holistic picture of all the pivotal multilevel elements in the real life context (Gummesson 2000; Stake 1995). Still, the essay benefits from extensive

preliminary work in form of two collaborative research projects conducted in different kinds of organisations giving some possibilities to comparison and generalization. The *first* project aimed to find ways to develop strategy implementation through developing employees' role in strategy process, and the *second* among sales, marketing and communications practitioners aimed at understanding and developing cooperation between these functions in organisations. The data from the projects include survey answers from around 1500 and theme interviews with several hundreds of practitioners of which about 300 professionals of sales and marketing.

Action research was chosen because the aim was both to develop strategy implementation in practice and to expand general knowledge of developing strategy implementation. Action research is especially appropriate when the research question is related to understanding a process of change, development, improvement of some actual problem (Eriksson & Kovalainen 2008/2011). Moreover, action research increases understanding of real life challenges to the studied topic and thus increases quality, relevance and reliability of the research (Myers 2009; Stringer 2007).

The main risks of action research were taken into consideration, such as avoiding consultant role by ensuring the 'clients', i.e. the commissioning party's respect for the research and the time it takes. The contribution was free of charge to increase the objectivity. General credibility was pursued by substantial preliminary work in the field and in the chosen organisation (Gummesson 2000; Myers 2009; Stringer 2007). The research was conducted tracing the integrating approach of Kurt Lewin (1946) that combines action and research in holistic, complex social systems. Lewin emphasized that change requires action, a real problem from the practice and a process whereby the members can be engaged in and committed to changing their behavior. A successful change demands a 'felt-need', correct analysis of the situation and realistic fact-finding. Action research proceeds in an iterative, spiral process of planning, fact-finding, action, evaluation and research. To be effective change must take place at group level, and the process must be participative and collaborative involving the concerned (Burnes 2004; Lewin 1946; Stringer 2007).

The research is participatory, in the sense that the issue comes from the felt needs of the practitioners and collaborative and community-based in the sense that the practitioners of the focal communities take part in the project from its beginning to the end and learn from the process, with and from each other and the social conditions affecting them (Cassell & Johnson 2006; Park 1999; Stringer 2007). According to Park (1999) participatory research with human interaction and dialogue are essential for generating knowledge and learning more than simple functional explanations, similarly interpretive and relational knowledge are important for increasing the knowledge in community life. In this research the practitioners took part in the actions and defining of the needs from the very beginning to the evaluation in the end of the project and at its best the process can raise awareness, empowerment and collaboration (Gray 2009; Stringer 2007). Yet, the researcher carried the responsibility for the

research design and implementation, assessment of reliability and reporting of the results. The researcher's role was two-folded, both practical and theoretic. To have all the information needed the researcher interviewed the practitioners and gained knowledge by working together with the practitioners. The results were evaluated together with the practitioners.

The data in action research were gathered in different ways, both formally and informally, through active involvement (Eriksson & Kovalainen 2008/2011). In this research the most important informal source of information proved to be the queue to the coffee machine in a tiny kitchen in the middle of the office. Information was gathered through interviews, discussions and cooperation with the relevant practitioners but also through observations in an ethnographic process where the researcher was part of the community, working together with the practitioners and involved in the development project. Ethical issues were taken into consideration, the participants were respected as experts of their own work, their privacy was guarded and the material handled confidentially. The project was part of the practitioners' work and the practitioners had the right to refuse to participate in interviews or meetings (Stringer 2007). However, none of the practitioners refused to participate, instead they were interested and engaged, perceiving the development as important.

The data analysis focuses on the practitioners' interpretations in their social reality of the proceeding and results of the project, reflecting to the results of previous research. The findings were compared with the tools of activity theory in a cognitive and empirical analysis attempting to link social and individual learning and transformation in a network of interconnected systems as suggested by Engeström (1999/2003) and Jarzabkowski (2010). The researcher entered the activity systems undergoing transformation and together with the practitioners attempted to form a new view on the strategic activities. The cooperation, interaction and strategic practices were studied as a concept of goal-oriented collective and individual activity that explains how individual actors, the community and their shared endeavors were integrated in the pursuit of activity, as Engeström (1999/2003) puts it.

The results of the action research were reflected to the background data gathered in the collaborative projects.

4.4 The research process and the project in practice

The description of the research process in the case organisation proceeds according to Lewin's cyclical model through a series of steps from planning, action, observation to evaluation, with the steps overlapping and running in parallel with each other (Dickens & Watkins 1999; Gray 2009, 318; Lewin 1947). The model in this research has been modified with a similarly proceeding model of Susman and Evered (1978) starting with analysis, fact finding and

reconceptualization, planning, acting, observing and reflecting and acting again. Figure 4 presents the action research cycle in the case organisation following the ideas of Lewin and Susman and Evered.

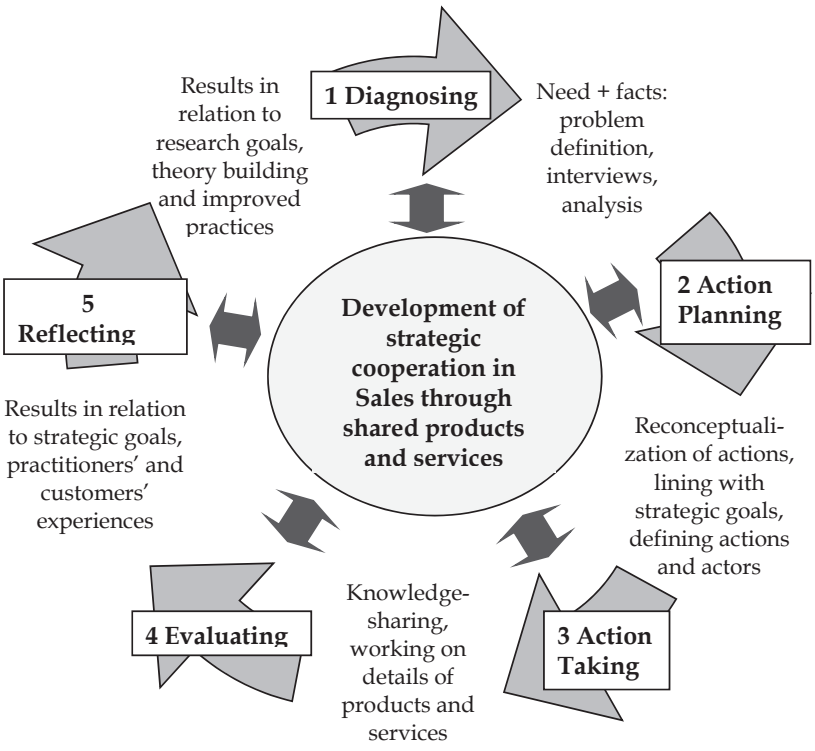

FIGURE 4 The Research Process in the case organisation deploying the models of Lewin (1946) and Susman and Evered (1978)

Contemporary ideas of action research routines follows often the same logic, e.g. Stringer's model (2007) in which the phases are grouped and named somewhat differently with three main routines: 1) 'Look', comprising gathering data, defining and describing situation, 2) 'Think', including analysing and theorizing and 3) 'Act', including planning, implementing and evaluating.

4.4.1 Diagnosing

The diagnosing phase began with preliminary work already a year before the concrete development project, with interviewing the strategic manager and CEO assistant about the strategy processes and the employees' role in strategy work. These interviews gave a picture of an open and active, multicultural and collaborative working culture in the company, with all personnel having possibility to take part in strategy discussion from the beginning of the process. Strategic information was translated in tandem to all the HQ languages even

though English was the company language. Still, the interviewees perceived that understanding of the strategy in a similar way in the headquarters and the country organisations was a challenge in strategy work. An employee survey with 57 answers out of 160 was conducted to find out how the launched strategy was understood and what kind of support the employees felt they needed in implementing the strategy. An average of 3,25 on the scale from 1 to 5, experienced that they were familiar with the strategy. The goals were understood rather well but more than 90 % of the respondents thought that the strategy had affected their work only little or nothing at all. The respondents wanted the strategy to be aligned with their personal targets. More direct feedback and support on implementing was wanted from the direct managers. Only 5 percent perceived that people had been taken into consideration in the strategy, accordingly more HR presence and training opportunities were wanted. Clear information, more transparency, better communication on managerial level and between departments, cross-functional co-operation and workshops were desired. These results were presented to the executive team and utilized in the researcher's first essays increasing the researcher's preliminary understanding of the need for development in the organisation. During the following year the delivery of information of the strategy was developed in the organisation especially through managers and direct superiors. Attempts to develop the cross-functional co-operation were taken. A year after, when the cooperation continued, a need for developing these issues was still experienced.

The project started with defining the need for development on the basis of the latest mid-term business strategy goals together with the headquarters' B-to-B Sales Director and Sales Manager. Developing products and services in cross-functional cooperation was set as the first concrete goal. As a starting point for the project was agreed planning and implementing captive product packages. A preliminary program of the project was agreed on and the researcher began as a nonpaid project worker in the organisation, having a desk, computer and a position informed by the HR, which made it possible to start discussion with the practitioners involved.

The understanding of the situation and gathering facts was gained by conducting ca. 30 interviews among the practitioners in the focal departments during the following two months. The objective of the interviews was to find out the attitudes towards the planned cooperation and collect experienced best practices, development needs and proposals. The interviewees were chosen on the grounds that they had a relevant role, task or knowledge of the cooperation and the processes, products and services which were to be developed. The interviews followed similar conduct and themes, seeking understanding of the possibilities and problems of the development but applied to every practitioner's level, department and task. The interviews were not recorded to maintain a relaxed and collegial atmosphere but instead documented and checked by the practitioners to minimize misunderstandings. The duration of the interviews was ca. one hour each, except of the focal managers who were

consulted several times and the discussions can be characterized more as negotiations, and the country managers who were interviewed briefly in a video meeting and by e-mail. In addition to these interviews the researcher had possibility to continue the discussion in a more open and deliberate manner and ask more questions if needed. The practitioners were very keen on solving the problems collaboratively and developing the cooperation. The interviews in the diagnosing phase are listed in Table 9. (The titles have been simplified in order to be clearer and to shelter the company and the field).

TABLE 9 Diagnosing: The first phase interviews in the beginning of the project, total amount of interviews 32

Function/Unit	Practitioner	Key tasks in the cooperation
HQ B-to-B Sales	Sales Director	Supporting strategic cooperation
	Sales Manager	Implementing strategic sales together with field personnel
	Sales Marketing Manager	Branding cooperative products and services
	Marketing Consultant and Marketing Coordinator	Planning brochures, newsletters of cooperation products
	Sales Area Manager	Selling strategic products and services in practice
HQ Service	Service Director	Supporting organisation in implementation of strategic cooperation
	Marketing Manager	Planning marketing of service products
	Field Manager	Supporting field team in implementation
	Service Marketing	Planning and implementing strategic services
	Product Manager	Responsible for service products and supporting strategic services
	Technical Support	Planning products and services
HQ Sales	Sales Director	Responsible for BtoC Sales partly in same products and services as BtoB
HQ Supporting functions	Strategy and Business Planning Manager	Supporting organisation in implementing strategy
	HR Director	Supporting people in strategy implementation
	Communication Director	Strategic, internal and marketing communication
	Communications Coordinator	Strategic, internal and marketing communication. Pr, events, news, media
	Quality Managers x 2	Responsible for quality of products and services on the field
	Loyalty Manager	Planning and implementing customer programs and loyalty systems
	Project Manager x 2	Working on a project especially relevant for strategic services in focus
	Marketing Incentives Manager	Planning incentives for increasing sales
Country organisations	Country Managers x 4	Implementing strategies on markets
	Field Manager Performance Managers x 2	Selling strategic products and services and taking care of processes on field
	Marketing Manager	Implementing HQ marketing strategy on market
	Marketing Coordinator	Brochures, information of new products, cooperation in brand and marketing work

The interviews in the headquarters' B-to-B Sales unit mediated a clear need for development. The unit was rather new, separated from B-to-C department only two years earlier in order to increase sales as an essential part of the organisation's growth strategy. The working processes, cooperation practices and communication channels towards customers and within the organisation's functions were still under progress. More knowledge sharing was urged so that the employees would understand the direction and strategy of growth in a similar way. A need was experienced for branding products and services, to better convince the customers and for developing the identity, working culture, shared vision and values for the department. The perceived target was to better understand the B-to-B customers' needs to develop the business from product towards service orientation and to treat the customers more like strategic partners.

The Service director described the unit as an own, independent organisation with a supporting function for the headquarters' other functions. The strategic goals set were 1). customer loyalty and service retention, 2). cooperation with dealers, 3). utilizing the service products and 4). supporting the turnover and profit of the headquarters. The director agreed on that there was a common will about the cooperation between B-to-B sales and Service unit. The service managers and practitioners ranked the planned cooperation and the supporting function of service to the third important strategic goal for the unit, i.e. one degree higher than the chief of the unit. The practitioners described their feelings as being ready and waiting for the cooperation in practice. The practitioners wanted to have more and clearer communication and planning of the products and services together with both units and customers. They had a rather shared perception about the B-to-B customers' appreciations of the total cost of ownership and peace of mind, and this demanding cooperative, captive packaging of product, service and price with flexible and personalized technical service and support.

The interviews with the other supporting functions confirmed the felt needs for the cooperation with B-to-B Sales. The units of communication, marketing, quality and loyalty focused on supporting sales to the private customers. The specific demands of B-to-B customers were not systematically identified, followed or utilized in any supporting function. Of supporting functions, communications had an ambitious cooperation with top management in implementing the strategy, even though the focus was not on B-to-B sales. The HR function instead reported that they did not have resources to focus on supporting people in strategy implementation and that they saw it as the line managers' responsibility. The projects and campaigns randomly touched the B-to-B customers, having the main focus on private customers. Correspondingly, the role of the B-to-B sales within the company was experienced as unclear.

The practitioners in the country organisations felt they had a good touch of the customer values which made the work more object oriented and the goals

clear and concrete. They perceived that the customers appreciated easiness, peace of mind, quick performance, good cooperation, genuine support, a good package of product, service and price and good service especially after making the deal. The working atmosphere was experienced as open, collaborative and supporting. However, more resources, awareness of the product and service packages were demanded from the headquarters.

The conclusions driven from the starting interviews, was that the cooperation was seen as strategically important and the practitioners were ready, eager and more or less prepared to start the cooperation. The nearer the customer surface, the more positive the attitudes were.

4.4.2 Action Planning

The second phase of the research, Action Planning, combined the originally agreed goals of the development project, the interview results and the strategic goals. The goals were conceptualized more concrete and the actions needed were defined. The *goals* linking with the corporate strategy were defined as:

1. Increasing sales, professionalization and specialization in cooperation
2. Increasing engagement, performance and quality in the field
3. Increasing awareness and proactive communication with customers

The *means* to meet the goals were conceptualized to:

1. Captive product and service packaging with supporting field tools, documents and systems
2. Studying customer needs
3. Planning brochures, news, campaigns on cooperative products and services

The plans were presented to both unit directors who agreed on the goals and accepted the means. The key practitioners were chosen to start the discussion of captive packaging of products and services. The B-to-B director set a one month time goal on planning the captive product and service packaging and the service director urged on studying the customer needs.

4.4.3 Action

The research had been proceeding according to plans as far as to the Action taking phase when the first problems arouse following clearly the conflicts Stringer describes (2007) from hierarchical problems to lack of communication, stress, work deadlines and people conflicts. The action plan was accepted by both key directors and the key practitioners as well, and the first cross-functional meeting to start the development work was scheduled, when one middle manager from Service unit stopped the process by demanding a clear message from the directors of what exactly was wanted. This intervention was

understandable because the employees wanted the information from their own superiors instead of from a researcher without a position in the organisation's hierarchy. The communication was disturbed because of work deadlines, stress and the differences between the departments but the main problem seemed to be in attitudes or problems in relationships between the management and employees. Another recognized slowdown was the bureaucracy from the parent company in Europe making it impossible to implement especially the technical changes independently.

Because of these setbacks and the researcher's full-time work period in the company taking end, the project start was postponed. The project continued with working on details of products and services with two key practitioners in meetings once a week. The cooperation of the units continued as before, as ad-hoc selling cases without systematic knowledge sharing or united sales efforts. The researcher discussed the problems that the practitioners perceived with the B-to-B unit director, and conveyed their wish for knowledge sharing and interaction in two occasions during the spring without success. It seems obvious that the unit manager was not really interested in the strategic goals or implementing the strategic project of the cross-functional cooperation.

4.4.4 Evaluating

The strategic project was implemented rather poorly in relation to the goals. Despite the project's clear link to the strategic goals, the felt need for cooperation, the clear message from the first interviews and the positive expectation in the organisation, the cooperation started arduously and shattered to some practitioners' work on less important details such as agreement texts, rebate tables and registration systems. The cross-functional development was not followed, supported or encouraged. The defined means to meet the goals were only partly realized in a slow time schedule without impact on sales that followed the usual, ad-hoc practices. The professionalism of service personnel was not utilized in sales. A project to increase specialization and professionalization in form of business centers was postponed. Field personnel, area and middle managers worked actively to enhance performance and customer interaction but there were no visible larger scale efforts together with the unit director, and the supporting functions of the organisation were not used to increase the awareness of the customers. The researcher was a facilitator without power to boost the development. Attempts to call together cross-functional meetings failed. For the practitioners the vision was clear and the inspiration was there, the only missing link was the empowerment and encouragement from superiors. Taken together, only dedication was achieved of the positive elements of engagement; vigor, dedication and absoption (Bakker 2011; Schaufeli et al. 2002) and several important elements of activity were missing such as sensemaking of the meaning of the strategy for practitioners' practices, defining of rules and roles, managerial support, interaction and cooperation of all involved. Stringers' (2007) warnings for the running up the realities in implementation phase

seemed to realize, i.e. when the practitioners did not get the support they would have needed in the change project, they reentered the community contexts where responsibilities and crises crowd out new activities.

A dialogic, hermeneutic meaning - making evaluation together with all the stakeholders is recommended to allow a more democratic, empowering and humanizing approach (Park 1999; Raelin 1999; Stringer 2007; Susman & Evered 1978) but a meeting together with the unit directors and practitioners was not possible because of the busy schedules and holidays. The project had shattered in the units to only a few key practitioners instead of being a project concerning all community members. The situation and results of the project were thus evaluated individually with eleven key practitioners, three from B-to-B sales, five from Service unit and three area managers from the field. Some of the discussions were shorter, 10-15 minutes squeezing up the most important information, some longer, lasting about one hour, and one was via email. The discussions were open and focused on the core issues of the implementation of the project. As the practitioners' standpoints were mediated to the directors, the discussions were partly democratic giving voice to the practitioners even though the direct interaction failed.

In action research it is essential to not just observe what happened but rather how the stakeholders perceive, interpret and respond to the issue investigated (Stringer 2007). All three practitioners from B-to-B sales perceived that some cross-functional development had taken place such as brochures, campaign plans and some good cooperation on personal level but felt frustration for the development being so slow, the communication climate so minimal and the lack of leadership so obvious. Two practitioners from the Service unit had cooperated with the B-to-B unit director, having thus the information they needed for their tasks in the project and they were pleased with the things proceeding, even though slowly. Two practitioners felt they did not get any information about the cooperation and were disappointed because they had looked forward to the development, and the fifth practitioner was pleased with the information that was provided from the own unit director but thought that the communication could be more systematic also between the units. From the field I got three evaluations out of seven area managers, of which the first one was positive and thought the cooperation and communication were good but would have wanted the development of the captive product packages to be faster. The second one stated that the cooperation did not exist at all on that market. The third one was disappointed with the development, frustrated with the zero communication, cliquish interaction and lack of information. Most alarmingly he thought the problems had a clear negative impact on sales and the contact with the dealers. He suggested open discussion about the problems, rapid development of captive product packages with field tools and brochures and at least quarterly meetings with big dealers.

To sum up, half of the key practitioners' were disappointed and frustrated, when only three were pleased with the cooperation, even if they also

thought that the development had been slow. They interpreted the unit directors' disinterest as non-empowering, even though they knew and felt that the project was strategically important. The researcher was understandably seen a 'wrong' person to lead a strategic project being an outsider without a position in the company. The practitioners' response was to work on the given premises of the project as a 'side task'.

As the unit director could not be reached for evaluation, and a meeting to handle the problems together was not possible, I ended up in a difficult choice as a researcher, how to report the results. As there was seen a clear need among the practitioners for solving the problems I felt that it was my duty as a neutral facilitator to report the concerns upwards. Stringer (2007) similarly recommends the researcher to act as a mediator in conflicts. The evaluation results were thus collected to one sheet of paper and presented in a face-to-face discussion to the CEO of the Finnish headquarters. The CEO had got only occasional messages of the troubles in the focal unit, so the extent of the problems was new information for him. I could only hope he would use the information soundly to develop the working premises for the practitioners and thus the possibilities for good performance and outcomes.

4.4.5 Learning

The research question was "How can the implementation of a strategic cross-functional cooperation project and the employees' engagement in it be improved?" The premises for the implementation were good, as there was no resistance in the organisation, and the key practitioners and supporting functions were positive and committed to the project. The strategy and the goals were presented to the practitioners in a quarterly video meeting where also the area managers from the countries and the researcher participated. The presentation did not wake any discussion and the cross-functional cooperation was not discussed again in meetings afterwards. So the formal mediating of the strategy was carried out but the sensemaking processes were missed, not to talk about the consistent social action that Mintzberg (1994), Stensaker et al. (2008) or Weick and Robert (1993) call for. The practitioners understood the goals and the importance of them but their role in the implementation was not discussed or supported, so they worked for the goals that had been defined in performance appraisals earlier. The practitioners ended up in a conflict situation because they knew the strategic goals but they did not have the authorization to work for them. They lacked thus the empowerment in the implementation. This state of strategic consensus could, with Floyd and Wooldridge (1992) terms be called 'informed skepticism', while practitioners had the understanding of strategy but the commitment was low, and thus the implementation failed. Such discrepancies exist in business, when the strategic intent and the social skills to cooperation and interaction towards the common goals are missing (Hamel & Prahalad 1989/2010). As Nohria, Joyce and Robinson (2003) put it, the strategy as such is not important but the way it is executed and informed to the employees and partners so that they understand

it. According to these authors, what really 'works', would clearly have been essential in this case too, i.e. holding high expectations about performance, inspiring and empowering managers and employees to independent decisions and finding ways to improve operations and rewarding achievement. Ongoing social interaction and collaboration in strategy process are of elementary importance as e.g. Sull (2007) underlines. Performance is highly affected by the support the employees perceive they get in the organisation (Eisenberger, Huntington, Hutchison & Sowa 1986; Kottke & Sharafinski 1988; POS 2012; Rhoades & Eisenberger 2002). In this case the support from the organisation members in the own unit was good but the perceived supervisor support (PSS) not as high.

The results of this implementation project can be reflected with the author's previous multiple-case research of factors employees perceived as related to their engagement in strategy process (essay 2). Action, cooperation, encouragement, support and trust were found as fundamental, first order elements to strategy implementation. Second order elements like interaction, knowledge-sharing, sensemaking were noticed to make it possible to learn and engage, and link together the other essential elements of strategy implementation. Engagement and combinations of knowledge and competence, processes were figured as more complex third order elements, demanding existence of several first and second order factors. In this messy real life case the third order elements such as engagement, knowledge and competence of people and the whole organisation culture were positive for the change but the basic assumptions of action and interaction were missing.

The working cultures of the counter parts of the planned cooperation were different in a traditional way so that the sales preferred more ad-hoc and in service the long term relationship with customers were seen as more important. Still, practitioners in both units saw the advantages in cooperation for branding, partner relationships and co-creation of value with customers, which also marketing research calls for (Gummesson 2007; Kotler 2004; Kotler & Pfoertsch 2007; Prahalad & Ramaswamy 2004). The change would demand a new mindset of focus from individual selling to team work, developing of leadership and management skills as Weitz and Bradford (1999) state and a strategic change towards a more interactive business culture as Järventie et al. (2011) claim. To be effective, change must take place at group level, involving the concerned collaboratively (Burnes 2004; Lewin 1946; Stringer 2007). In this case the practitioners near the customer interface understood the relevance and need for strategic change better than the management. However, employees cannot undertake new behaviors if the tensions destabilizing the status quo are not understood and if the new practices are not rewarded by their supervisors (Marsick & O'Neil 1999).

Comparing the results of this essay with the results in the preliminary surveys and interviews reveals that sales professionals' attitudes to cooperation were positive in a larger scale, and they felt a need to understand better the practices of other functions. The professionals were ready to develop their own

activeness and share their skills in cooperation. The biggest challenges they experienced were lack of time and resources, unclear responsibilities and a need for common goals, clearer processes and practices, encouragement from managers and an open discussion culture.

As activity is a major element of engagement and implementation, the project can also be reflected with help of Engeström's activity theory (1987/2001), see Figure 5. The activity system carries multiple layers of history in its artifacts, rules and conventions. In this community the ways of working were open and interactive. The tools and signs can be seen for example as the strategy that has been informed to whole personnel. The division of labor in the activities creates different positions for the participants with their own diverse histories. The subjects, i.e. the practitioners in the project had a clear picture of the object, the advantages and possible outcomes of a strategic cooperation. The rules are especially interesting for this research; following the strategy should be the rule number one in business but the hierarchical and bureaucratic rules can often go ahead like in this case, where the employees' activities in the process were stifled in lack of support and encouragement. The employees were not able to change their engagement to activity in practice, even though they knew that the objective was important in the organisation's strategy. The framework of activity theory clarifies the picture of the problems, and captures rather well Engeström's main principles e.g. the multi-voicedness and historicity, i.e. giving voice to the community members' troubles and innovations in the activity system, based on the comprehensive fieldwork during a longer period of time. Contradictions, historically accumulating structural tensions within activity systems, as sources of change and development, can in this research be seen as the roles of managers and employees in strategy work. Still it is important to notice that the analysis does not include the collective evaluation as a source of learning and transformation but tries instead to summarize the individual practitioners' evaluations in an objective way.

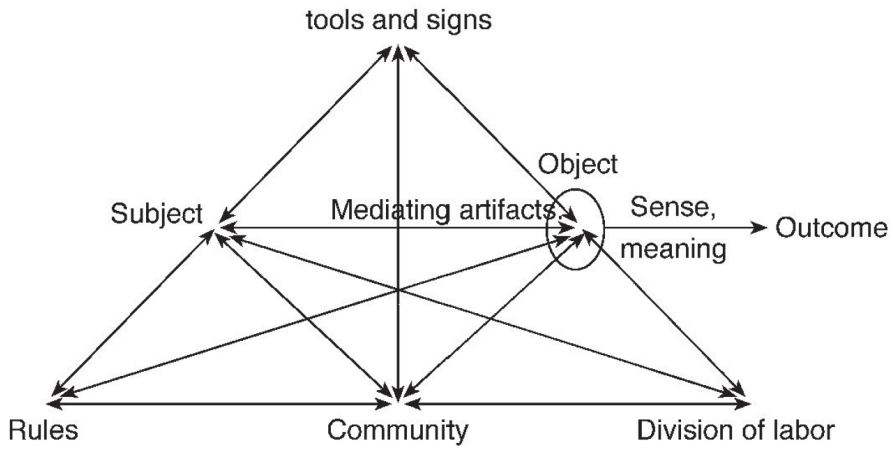

FIGURE 5 Engeström's activity theory (1987/1999/2001)

Activity is not just a causal relationship between the subject and the object, but mediating actions in a large system of tools, signs and rules of a community. Activities are deeply embedded in broader societal and macro-institutional contexts (Vaara & Whittington 2012). In order to understand how the employees perceive their role and possibilities to improve their engagement in the processes, several factors that are pivotal in the context must be understood. Drawing from the results of this research and the latest literature on strategic practices, the core of the dynamic model on strategy implementation is seen to take shape from action oriented elementary factors. Continuous interaction, sensemaking and reflective knowledge are essential to build meaning of work and engagement and thus, construct together with the practitioners capabilities and successful outcomes. The major task for managers is to create forums and artefacts for social interaction, activity and cooperation on implementing the organisation's strategy. The dynamic model is described in Figure 6.

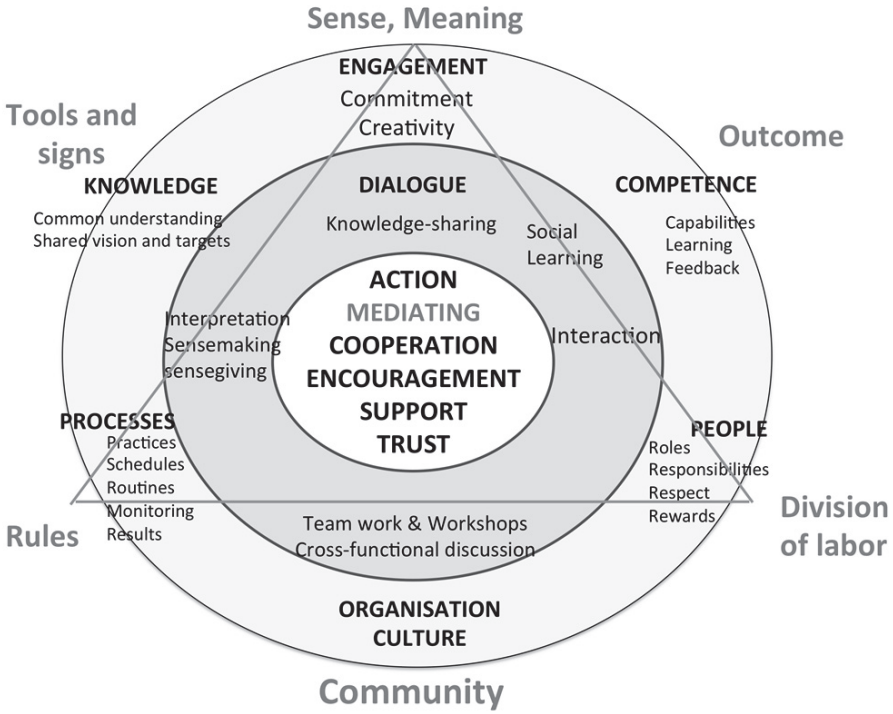

FIGURE 6 A dynamic model of engagement in strategy process, reflected with Engeström's activity theory (1987/1999/2001)

The *development* of implementation of a cross-functional cooperation project and the employees' engagement in it can be studied at three different levels: *First*, the improvement that could have helped this particular implementation process, *second*, the improvement that can be planned in the current situation in the organisation or *third*, the improvement that can be suggested on the basis of this project to be done when planning or implementing similar kinds of

complex real life strategic projects. In this project the cooperation, interaction and knowledge sharing were the most important parts that could have been done much better. The discussion of the rules of working would also be important: what are the roles of the managers and employees in strategy work, what are the strategic goals that concern the practitioners and should be prioritized, and to what extent can the practitioners implement the strategy independently.

In current situation the game need not be up yet, and the involved could meet with the directors, discuss the strategy, strategic goals again and how they manifest in the business plan, define the rules and roles of strategic activities in the community and plan together how to proceed with the increase of sales in cooperation. The higher the participation and the appreciation of the issue are, the better the affect can be. Dedication as an essential element of engagement (Bakker 2011; Schaufeli et al. 2002) is already achieved, and it could be argued that the feeling of enthusiasm and meaningfulness is the hardest part of the three, and capturing it would enable capturing the other two, vigor and absorption, more easily. The premises for strong engagement exist and should be directed with individual goals and rewards, the achieving of which should be followed and supported to improve the results of the organisation.

This project gives several ideas to improve strategy implementation in organisations' cross-functional cooperation also in general. The elements that emerge as important for the implementation seem to be elementary activities of interaction, knowledge sharing and cooperation. Strategy implementation is a social activity that is affected by many factors in the community of the organisation, its culture, rules and roles. The results are in line with e.g. Balogun and Johnson (2005) who noticed that change is underpinned by a wide range of social interaction, both vertical and lateral, Stensaker et al. (2008) who claim that managers should introduce more focused implementation activities and learning together with the practitioners, and Ikävalko (2005) who argues that different types of practices, institutionalized and loosely-coupled, established and recurrent, individualized and stochastic as well as different kinds of arenas are needed for strategy process and implementation. Concistent with Mantere (2003) I argue the operative and middle level practitioners can often be an unused strategic resource or even prevented from having an active role in strategy work. The individual champions who feel strongly about the strategically important issues can have a major role in the success of the organisation.

4.5 Conclusions

The research contributes to management literature by several ways. It gives support to many studies of implementation endeavors not succeeded as planned. However, the action research and micro-level observation during a

longer time in the center of an organisation's strategic implementation projects regarding the core processes, provides a deeper understanding of the employees' engagement in the processes increasing both practical and theoretical understanding of complex real-life strategy work in order to complement the in strategic management research still existing implementation gap. Action research brought about quite new features of the practitioners' roles in strategy work that were obtained through the interviews. Even though the organisation had an open discussion culture and the practitioners were engaged more fundamental elements of cooperation such as interaction, empowerment and encouragement from own superior proved to be more essential.

To produce relevant and useful knowledge in rapidly changing environments of organisations, the messiness of real life contexts needs to be accepted. The contextual awareness achieved through extensive preliminary work and engagement during a longer time, is important as Mohrman and Lawler (2012) suggest. Participatory and collaborative research together with the practitioners, increase the relevance and usefulness of the generated knowledge providing a better reliability and validity because theory is not separated from practice and the data are rooted in real action. With constructivist intent it is possible to both develop working cultures and results of organisations, and simultaneously increase the body of knowledge of managing real life challenges of strategy implementation and cross-functional cooperation.

Participatory and collaborative action research following the classic models of Lewin (1946) and Susman and Evered (1978) provided a clear tool to diagnose and evaluate implementation processes in hermeneutic circles capturing thus better the human values and actions instead of merely causal explanations. A real project in its social context can be situational and surprising compared with theoretical models. In this case the factors figured in advance as the most demanding, such as employee engagement and open organisation culture, already existed in the organisation but did not help in the implementation project, because of the missing basic elements of action and interaction between the practitioners and managers. Correspondingly only a dynamic model combining essential elements of action can describe successful implementation activities and people's role in them. Engeström's (1987/1999/2001) activity theory has many similarities to this thinking, noting the context and society depending factors and giving additionally new pieces to recognize essential elements of activity systems.

The practical contribution of the research is revealing the embedded social realities behind a strategy implementation endeavor and offering managers means to understand how to face the challenges of cross-functional implementation processes. The message to managers and leaders is simple even though not always easy in practice; it is action and interaction, encouraging and empowering people that count. Too often the focus is only on strategic planning, reorganisations or cutbacks instead of cooperation and development.

The research has several limitations. Even though focusing on only one case increases the possibilities to gain a deeper understanding of people's actions and perceptions, the generalizations build only on a single case and one strategic implementation project. It is important to notice that the reported perceptions of people are mainly explicit explanations of the problems; for example Putnam (1999) underlines the importance of pursuing to understand in more profound real life complexity, ambiguity and uncertainty and unconscious thinking behind actions. He argues that because of messy relationships and hidden culturally derived realities people in common act in ways that disempower themselves and others. This kind of understanding and interpretation is always subjective and thus not always generalizable. Even though the research in the company was spread out to a rather long time period, it was not enough to understand all the underlying attitudes, perceptions and relevant social relationships. The researcher's role as at the same time outsider and insider in the company is still an advantage, because it is easier for the organisations members to discuss delicate matters with a person who is not part of the social and bureaucratic hierarchy in the organisation.

The research suggests several areas for further research. Deeper insight is needed to understand the employees' role, empowerment and engagement in strategy implementation and cross-functional cooperation through action and process orientation. More empirical research would be needed on employees' and managers' cooperation practices and processes when implementing strategy. Particularly interesting would be studying the middle level practitioners' role and identity in strategy processes between the top management and the operating personnel especially across unit boundaries in organisations.

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V

MIDDLE-LEVEL PRACTITIONER'S ROLE AND EMPOWERMENT IN STRATEGY PROCESS AND IMPLEMENTATION

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5 MIDDLE-LEVEL PRACTITIONER'S ROLE AND EMPOWERMENT IN STRATEGY PROCESS AND IMPLEMENTATION

ABSTRACT

This essay explores employee's perceived role and empowerment in strategy process and implementation of strategy in ten organisations focusing on middle-level practitioners such as middle managers, assistants, experts and officers between top-management and grass-root level. The empirical data consist mainly of semi-structured interviews of practitioners analysed qualitatively. The empowerment is studied through examining the perceived levels of obtained strategic knowledge and interaction in the organisation's networks. The purpose is partly descriptive, in order to give a comprehensive picture of the practitioners' roles and mediating their emic perceptions of the practices and empowerment in the processes. The aim is also in constructivist spirit to conceptualize an active and empowered role of middle-level practitioner in strategy implementation. Results suggest that a successful middle-level practitioner's role in strategy implementation constitutes of different forms of interaction in the organisational network. By empowering middle-level practitioners it is possible to develop strategy implementation and performance.

Keywords: Middle-level practitioner, role, empowerment, Strategy implementation, Strategy process, Strategy work

5.1 Introduction

This essay examines middle-level practitioners' perceived roles and empowerment in strategy processes, in particular strategy implementation, in order to better understand the gap between strategic planning and successful implementation. Of special interest are the middle-level practitioners having a strategic position between top-management and grass-root level. In addition to middle managers practitioners in supporting functions such as assistants, experts and officers are studied, thus extending the research of for example Floyd & Wooldridge (1992), Gioia & Chittipeddi (1991), Rouleau (2005), Wooldridge, Schmid and Floyd (2008) on middle manager agency in strategy work.

In the spirit of Strategy-as-Practice the practitioners' activities are studied at micro-level close to the actual work (Johnson, Melin & Whittington 2003; Carter, Clegg & Kornberger 2008; Vaara & Whittington 2012) and appreciating the practitioners as human actors with emotions and motivations (Jarzabkowski & Spee 2009; Mantere 2003). The essay extends Mantere's (2003) results on employees' roles in strategy processes examining in more detail the activities and perceptions of these practitioners attempting to understand the underlying purposes, intentions and feelings of people as Kriger (2005) and Carter et al. (2008) suggest. The research is, as Vaara and Whittington (2012) state, part of the S-as-P development beginning to recognize a wider range of actors in strategy. According to the critical perspective the research agrees with that advancing the discourses would empower the employees as active actors with creative potential (Knights & Morgan 1991; Mantere & Vaara 2008; Neuman 2002).

The practitioners' empowerment is studied comparing the strategic knowledge they perceived they had obtained and the level of interaction they experienced characterized their role in the organisation's strategic cooperation networks, believing like Foucault (1977) and Ibarra & Andrews (1993) that empowerment is interwoven in social relationships and related to knowledge and interaction, and like Bowen & Lawler III (1992) and Kanter (1979) that sharing knowledge and power between managers and subordinates can mobilize capacity and resources to get things done. The empowerment that is searched is close to Spreitzer (1996) and Thomas and Velthouse (1990) definition of empowerment as an individual's perception of increased intrinsic task motivation with a sense of impact, competence, meaningfulness and self-determination related to a pro-active orientation to the work role. This definition can be complemented as Spreitzer, Kizilos and Nason (1997) suggest explaining the *dimensions* of empowerment, i.e. *meaning* refering to purposefulness and fit between the needs of one's work role and values, *competence* as related to self-efficacy, personal mastery of possessing the right skills and abilities to perform the job well, *self-determination* as feelings of autonomy and control over one's work and impact in turn, as sense of control

over organisational outcomes. Spreitzer et al. (1997) moreover state the dimensions of empowerment are positively related to effectiveness, even though through different combinations of the dimensions.

The purpose is partly descriptive, in order to give a realistic picture of the practitioners' actions, practices and perceptions, and partly a theoretical concept analysis identifying the dimensions of the middle-level practitioner's role in strategy process. The main research question of the essay is: **How is an active and empowered middle-level practitioner's role constructed in strategy implementation?**

The empirical aim is to understand the practitioners' concrete practices and perceptions of significance and empowerment in strategy process. The preliminary idea is that 1) we need to understand in more profound the middle-level practitioners' roles in strategy process to be able to enhance strategy implementation, 2) understanding these practitioners' roles requires understanding their perceptions from their own angles, 3) an active role of practitioners in strategy process increases the feeling of empowerment and significance, and thus possibilities to plan and develop one's own work and, thus work more efficiently.

5.2 Methods

The essay presents and analyses empirical data that have been collected in a procedural manner applying Yin's (2009) ideas of case study as an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-life context. The practitioners' authentic actions and perceptions are studied attempting to understand the phenomenon and constructs of people holistically and more profoundly (Piekkari & Welch 2011). The aim is descriptive particularization (Stake 1995) to understand the employees' roles in their uniqueness in the existing contexts instead of working with too strict methods comparing and finding differences with the cases. The cases have been chosen on qualitative grounds to be theoretically useful to get a holistic picture of practitioner roles in strategy process in different kinds of organisations (Eisenhardt 1989). However, this case study is instrumental in the sense that the research question is more important than the cases (Stake 1995). The research problem is relevant, coming from a real need in practice making the focus clear (Edmondson 2011). Yet, the research question is rather broad making it possible to gather the data in an open-minded way (Eisenhardt 1989). The abductive process navigates between inductive and deductive analysis (Charmaz 2006).

The participants were both managers and employees having a good picture of the strategy work in practice. The aim was to gain understanding of the positive and successful ways of working. The interviews were conducted with constructivist and ethnographic intent, appreciating the practitioners as part of the world they described, their organisation culture, ways of working, acting and interacting, however, leading the off-railing discussion back to

strategy work and strategy implementation (Charmaz 2006; Silverman 2001). The practitioners were asked to describe the organisation's strategy processes, their own role and tasks and also perceptions and feelings. Every interview started and ended with open discussion about general issues of the work in the organisation. Interviews were recorded and carefully documented.

The attempt was to understand the practitioners' emic perceptions in a hermeneutic way and build employee-oriented theory grounded in empirical reality of organisations' strategy in a critical, cognitive process (Birks & Mills 2011; Charmaz 2006; Locke 2001). The research benefits of preliminary work of surveys reaching more than a thousand practitioners and interviews of more than 20 organisations' strategy processes and strategy work. The gathered data were evaluated and analysed multi-methodologically and collectively. These data were used when assessing the results of the qualitative analysis of this essay. Cooperation in research, using of several investigators and evaluators in the process gave different perspectives and novel insights to the study and enhanced the confidence in the findings. The whole process aimed at useful research and can be described with Van de Vens's (2011) engaged scholarship, a collaborative form of research engaging key stake holders and practitioners in practical and theoretical cooperation.

5.3 Results

The presentation of the results follows inductive logic grounded in empirical observations in the spirit of Charmaz (2006). The ten chosen organisations, the participants are presented in Table 10, data description. In the first, initial round of empirical categorizing the practitioners' descriptions of the organisations' strategy processes and the positive elements of strategy work are presented. Middle managers', management assistants', Communications and HR officers' perceptions of their practices, roles and empowerment are presented and discussed. The descriptions are translated and shortened, however with attempt to maintain the emic emphasis. Based on cross-case studying of the expressed perceptions, the second round of analysis focuses on categorizing the practitioners' roles by perceptions of the level of knowledge and interaction of strategy as they most often mentioned that these elements had major importance for their active, empowered role. The term 'interaction' has been chosen to describe a large amount of expressions the practitioners used such as dialogue, discussions, sensemaking, meetings, cooperation, workshops etc. The applied S-as-P view supports these choices underlining sensemaking and interaction of strategy (e.g. Carter et al. 2008; Whittington 2007). Moreover, the learning and cultural perspectives emphasize human interaction and social learning (Schein 2010; Weick 2001) while the mainstream managerial oriented literature does not recognize the essentiality of interaction to the extent that employees' seem to perceive it.

An integrative model to understand the practitioner's perceived role and empowerment in strategy process is formulated drawing on the empirical data and the literature. Finally, insights emerging from the data are discussed and reflected with the research question, the whole research material including the results from the surveys and interviews in the preliminary cooperative projects and with other research conducted for similar purposes.

TABLE 10 Data description: The case organisations and participants

Organisation	**Data sources and the for analysis chosen middle-level practitioners bolded**
1 Large private concern and a part of a global provider of facility services, with more than 10 000 employees in Finland	Project manager. **management assistant** and **HR Coordinator**
2 Middle-sized multicultural northern European sales concern's headquarters with nearly 200 employees with parent company in Europe, part of a global group manufacturing and selling durable consumer products	Strategic manager and **CEO Executive Assistant, HR Coordinator**, a survey of middle managers and practitioners, 57 respondents out of 160
3 Large global concern with HQ in Europe and subsidiary and plants in Finland	Directors of Development and Communications, **Communications Specialist, six management assistants**
4 Large private Finnish concern, with levels from owners to cooperative units, along with their trade unions, working committees and cooperative parent company, with more than 10 000 employees	Strategy manager, Service manager, **11 middle managers**, 1 assistant
5 Large concern in construction and renovation with 50 000 employees globally, headquarters in Finland	**HR manager** responsible to HR director. CFO's presentation of strategy processes in practice
6 Large industry concern with 10 000 employees, HQ and local subsidiary in Finland. Subsidiary employs 900 and the plant 160 persons.	Concern's HR Director, Management assistant to CEO of subsidiary, **Executive Assistant of regional plant**
7 Large subsidiary in financial sector with 2000 employees in Finland, Northern European headquarters with c. 20 000 employees globally	**Management assistant** in a team responsible for strategy implementation actions with 300 hundred practitioners in Finland
8 Large, Finnish traditional producer of consumer goods, about 3000 employees and sales organisation with about 300 employees in Russia	**Export Director and CEO Executive Assistant in parent company, CEO and** managers of marketing, logistics and administration **in subsidiary**
9 Subsidiary in Finland with ca. 150 employees, HQ in Europe, part of a global concern	**Management assistant, communications coordinator**
10 Large Finnish subsidiary to a Northern European company in communications with c. 30 000 employees globally	Area manager, **Head of Support Office**, i.e supervisor of management assistant pool

5.3.1 Strategy processes and strategy work

The participants described the organisations' strategy processes in a very similar way throughout the project material, i.e. classic top-down, although the organisations were different, i.e. large and medium-sized, global and local, parent companies or subsidiaries. The employees' part of the process was clearly the implementation of the elsewhere designed strategy. In subsidiaries the guidelines to strategy came as a rule from the headquarters, even though in global companies the local strategy could be planned rather independently enabling sensemaking and thus social learning locally, underlined also by Gioia and Chittipeddi (1991) and Weick (2001).

The practitioners, except of the middle managers, perceived strategy work as managers' job and mostly as strategic planning, rather than practitioners' concrete practices. This means that strategy work as 'everybody's work in organisations is not yet reality. Yet, many of the studied organisations were in the process of starting to apply more interactive methods in strategy process and employees were encouraged to take part in the strategy discussion. The effective one-way information of strategy was perceived as important even though dialogue was experienced as most essential to understand what the strategy means in practice. There was a clear difference in how managers and employees experienced the adequacy of the interaction. Similarly Floyd and Wooldrigde (1992) stated that shared understanding and common commitment to strategy implementation relies on ongoing dialogues, Balogun and Johnson (2005) argued that a wide range of informal interaction, both vertical and lateral, is needed in addition to one-way informing, and Ikävalko (2005) noticed that informal discussions and meetings were most enabling in strategic action.

Communication at all organisation levels and between organisations was experienced essential in strategy process. At the middle-level of the organisation the need to communicate is towards all directions; horizontal and vertical in the organisation and also towards customers and other stakeholders. In concerns with headquarters and subsidiaries the importance of the communication between parent company and subsidiaries and between subsidiaries was underlined. In the large and middle-sized organisations the importance of cross-functional and cultural cooperation and cooperation between the different organisation levels were emphasized. In global organisations the global cooperation was experienced as the basis of all work and taken into account already in job interviews and recruitment. An open and encouraging organisation culture was perceived as equally essential in all cases. 'Open culture' was described with various aspects of good interaction between people in different kinds of organisations. The most essential elements of the strategy processes as the practitioners perceived them and the positively experienced features in strategy work are compiled in Table 11. Because the interview format was open-ended, the presentations reflect the issues that were mentioned as most important and cannot thus be compared in every detail.

TABLE 11 Strategy processes and positive features in strategy work as the middle-level practitioners perceived them.

Organisation	Characteristic for strategy process	Positively experienced features in strategy work
1 Large service company	Big differences in white- and blue-collar workers' possibilities to take part in strategy discussion. Top Management tells the strategy to blue-collar workers via video conferencing system. Strategy and own role are made sense of in own team. Superior support essential. Monitoring challenging when employees work in partner companies.	Strategy workshops and sensemaking between top- and middle-management and white-collar workers. For blue-collars orientation to work. Managers' personal commitment to the implementation.
2 Middle-sized multi-cultural HQ	Strong parent company relation. Diversity is respected. All personnel have possibility to take part in strategy discussion from the beginning. Strategy info to all units in tandem in English and local language. Dialogue between countries is a challenge.	Active communication, regular meetings and knowledge-sharing with all country organisations. Young personnel and culture. Middle managers' role essential.
3 Large subsidiary to HQ in Europe and part of a global concern	Genuinely global processes with multicultural organisations and teams. Clear guide lines from HQ but freedom to plan strategy for local market. Strategy is transformed to practical goals and project. Yearly strategy clock	Encouraging, learning organisation, innovative way of working, benefit from diversity. Cross-functional communication and knowledge sharing in many forums, e.g. CoPs, social media
4 Large private, multilevel Finnish concern	Equality, respect and representation of employees on all organisation levels, also locally, in decision making. Still, the employees' role is clearly the implementation of the strategy. Challenges in communication between levels.	Open dialogue, supporting of middle managers' sensemaking and sensegiving. Common values are shared. Everybody's involvement, individual and team development are encouraged.
5 Large global concern with HQ in Finland	Strategy process is seen as the backbone of all work, shared goals and values in strategy implementation, action plans and systematic monitoring and rewarding of results.	Directors participate actively in communicating the strategy to employees and the implementation actions and monitoring. Ideas from personnel are taken account of.

(continues)

TABLE 11 (continues)

6 Middle sized plant of large industrial group	Strategy is behind all actions. Sustainable, constant development and know-how respected in concern and subsidiary, challenging to stay up to date with the development	Open culture based on trust, everybody's opinion is important, good leadership, frequent interaction, systematic scheduling of meetings, process development in cooperation
7 Large subsidiary in Finland with HQ in Northern Europe	Strategy comes from HQ, is presented in subsidiary, actively discussed how to be applied locally and with HQ to develop the strategy. Middle managers have big role in implementation. Strategic goals are discussed from the point of view of every unit and individual.	Open discussion culture, failures accepted. Team work, cooperation, equality between employees, respecting everybody's ideas and suggestions to develop the local strategy. Local workshops with whole personnel.
8 Russian subsidiary to a big, traditional producer in Finland	Strong management and owner influence, strategy comes from HQ. Traditional, top-down strategy process in rather bureaucratic multilevel matrix organisation. Focus more on daily cooperation and middle manager activity than knowledge distribution because of rather stable environment.	Daily communication between HQ and subsidiary. Cooperation and well-established processes, systematic way of implementing strategy is appreciated, e.g. strategy clock and must-win-battles. Commitment of management team.
9 Medium-sized subsidiary in Finland, HQ in Europe	Systematic strategy work globally with strategy clock as main tool. European ways of working, parent company mission, values, communication and culture. Local strategy process rather independent and more precise. Strong sales orientation	Open, daily communication and cooperation towards all directions. Trust and knowledge sharing. Team meetings and intra with team working sites. Clear strategy process and schedule. Common understanding of strategy and values.
10 Large Finnish subsidiary to Northern European HQ	Laborious strategy process in multilevel, matrix organisation, focus much on economic factors, annual operating planning. Video information of strategy in whole organisation.	New processes, better commitment, yearly strategy clock helps planning the work, Cooperation and helping each other in the assistant pool.

5.3.2 Middle-level practitioners' roles in strategy process and implementation

As preliminary work, two larger surveys were conducted to gain understanding of middle-level practitioners' practices and perceptions in strategy processes. The first survey was sent to 9000 practitioners with a bachelor level education* (*With *bachelor* level practitioners it is referred to European standards of higher education according to the Bologna accord) in trade and business with more than a thousand answers. About 40 of the respondents were interviewed to get in depth understanding of their roles and the contexts. The results implied that practitioners have both interest and unnoticed capabilities that could be used in all strategy process phases. Rather than one way information, the practitioners wanted more interaction and knowledge sharing especially with their own superior. An open, encouraging communication culture was perceived as the most essential factor for good strategy work. Development appraisals and feedback were appreciated. One's own activity and additional training were perceived as important. The results in the ten case organisations were in line with the survey results and the results of an extensive research project with several researchers at Aalto University (2000-2011).

A smaller survey was sent to about one thousand management assistants with about 70 answers and the results supported the findings of the previous, larger survey. Of the survey respondents 46 percent thought their role was not so important in the strategy process, but more than half of all respondents were willing to develop a more active role in strategy work. About twenty management assistants were additionally interviewed and it was found, that the assistants did not always perceive they were doing important strategic work, even when they were taking part in organising and coordinating strategy work and helping management in strategic planning e.g. by searching, formulating and conveying strategic information. Still, the roles were rather different: A management assistant in a small company participated in the entire strategy process, from planning to review, while in a larger company the tasks could be limited to for example communicating or facilitating strategic events. The roles and empowerment of the practitioners' who were interviewed for this essay are studied in the following sections.

5.3.3 Middle managers' roles in strategy processes

Middle managers in the empirical material had rather different roles depending on their position in the organisational and social relationship networks. In subsidiaries where the middle managers did not participate in strategic planning, they experienced that the strategy remained remote from the actual work (org 4).

> "We have enough one-way information, but what we need is dialogue and briefing on personal level what does the strategy mean to you and your unit" (Middle manager, org 4)

The middle managers perceived predominantly that mediating the strategy, supporting and enabling the implementation was their task. However, they experienced a clear need for more support, communication and knowledge sharing of the strategy to be able to succeed in this task.

> "The biggest challenge is the intern communication. The more you involve people, the better the implementation succeeds. Feedback is important to see that the strategy is understood in a similar way."(Middle manager, org 4).

Participation in strategic planning enhanced the experienced empowerment in strategy work. In international cooperation (org 2, 8) the dialogue between parent company and subsidiary was emphasized more, and consequently the interaction was more frequent. In these circumstances the middle managers perceived their role as empowered.

> "Treating the people with respect is most important" (Middle manager, org 2)

> "Regular meetings, dialogue and cooperation are essential, we are more relationship manager type, we want to communicate orally and informally, you get immediate response and minimize misunderstandings. (Middle manager, foreign subsidiary, org 8)

The interviewed supervisor of management assistants (org 10) had a multilevel interaction position as a member of the executive team of the business unit and leading the communication of strategy at informal business level through the assistant team in the organisation.

> "I participate actively in the strategy implementation, in the organisation. The communication of strategy work, assistants stand for it, delivering memos, information, clearing out to whom, and also knowledge sharing between managers and personnel." (Head of Support Office, Org 10)

According to the interviews it seems that there would be more potential among middle managers to be used to enhance strategy implementation. The middle managers wanted to participate more, as also e.g. Westley (1990) and Hrebiniak (2006) noted in their studies. Rouleau (2005) suggests that middle managers have tacit knowledge they use every day when interpreting the strategy. Correspondingly, in this study employees experienced that the superior's encouragement and support had major value for their activeness. However, the middle managers' roles were especially challenging, because the strategy processes were top down (Balogun & Johnson 2005; Floyd & Wooldridge 1992; Westley 1990).

TABLE 12 The perceived roles of middle managers in organisations 4 and 8 and supervisor of management assistant pool in organisation 10

	11 Middle managers Org 4 (HQ)	**Three middle managers in subsidiary, Org 8**	**Head of Support Office (Org 10)**
Interaction in strategy process	Only part of middle managers had participated in strategic planning. More interaction and knowledge-sharing was wanted instead of one-way information distribution Yearly arranged middle manager event Own superior, other superiors and colleagues major support Interaction is active in the planning phases, but when the strategy is ready, the support and interaction decreases Resourcing, enabling and encouraging employees to achieve strategic goals Joint dialogue on how to reach the goals	Top-management Road Show starts strategic discussion. The strategy comes from parent company and the subsidiary strategy must follow the parent strategy. Interaction with parent company practitioners on different organisation levels is frequent. Continuous changes in strategy mediated from parent company. Team meetings with employees. Superiors task is to make sense of the strategy to employees	Member of executive team of the business unit. Active interaction up and down in the organisation and with HQ. Team meetings with assistant pool. Strategic communications in the organisation is assistants' task. Assistants are important communication links between top-management and personnel. Especially informal communication. Strategic workshops to all personnel together with the assistants. Supporting and helping assistants.
Knowledge of strategy	Strategy is perceived as remote, only a PowerPoint, not linked to actual work. There is enough strategic information, but too little knowledge-sharing	The managers perceived they had good knowledge of strategy	Good knowledge of strategy, insider in executive team, having "the big picture"
Perceived role, empowerment	The middle managers that had participated in strategic planning perceived their role more empowered, the others felt they needed more support and knowledge-sharing	The role is experienced as empowered and managers felt they succeeded in applying the strategy into practice	Supervisor of assistants experiences the role important and empowered. She has gained more respect also for assistant work in the organisation.

5.3.4 HR and communications officers' roles in strategy process and implementation

The interviewed HR Coordinator (org 1) and HR Manager (org 5) worked both for a large company where HR played the role of business partnership. The HR Manager had a comprehensive picture of the strategy process in the organisation and was daily communicating the strategy through several channels and supporting actively the middle managers in strategy implementation, whilst the coordinator had more narrow tasks in the process.

> "Strategy is the backbone of all work. It is most important to implement the values in daily interaction. Ideas and suggestions from personnel are taken seriously, that is a big part of personnel commitment and well-being. " (HR manager, org 5)

> The message of strategy is informed in all channels, same message is repeated again and again… it is really good, then you perhaps finally remember it. I now know the strategy, but still I wonder what my role exactly is, in practice. I am pleased with the communication in my team, but it would be good to have even more, dialogue, interaction and transparency." (HR coordinator, org 1)

In organisation 2 the HR function played a business partnership role, but the potential could not be used because the coordinator expressed they did not have time to support the organisation in strategy implementation. In the case organisations it could be seen, as also Ulrich, Brockbank and Johnson (2009) state, that the HR profession as a whole is moving to add greater value through a more strategic focus, but the business partnership requires HR professionals to have knowledge and skills that connect their work directly to the business.

The Communications Specialist (org 3) experienced that her main task was to communicate concern strategy in multiple channels of the organisation and she felt that understanding the strategy and the organisation increased the significance of the work. The communication was mainly one-way, but also f-to-f, cross-functional and informal in social media forums and CoPs (Communities of Practice). Her daily task was to find and create stories of strategy implementation in the large organisation and tell them in form of news, articles, videos etc.

> "Understanding the strategy and knowing the organisation makes the work fun, self-management, using the technical equipment and learning new things is fun. Working with language means flexibility - you just have one link to the strategy, and then it is a strategic message." (Communications Specialist, org 3)

The Communications Coordinator in org 9 had a practical, pro-active role in strategy process and multi-level communication network, participating in the daily business dialogue, planning and execution. She felt her role as courageous and independent.

> "Cooperation, knowledge sharing and trust make you strong" (Communications coordinator, org 9)

TABLE 13 The perceived roles of HR and communications officers

	HR Coordinator, Org 1	Communications Specialist, Org 3	HR Manager, Org 5	Communications coordinator, Org 9
Tasks, practices, interaction in strategy processes	Well-being and safety at work, employee survey linked to the strategy. Planning, organising and informing of all employee well-being events, training linked to strategy and safety at work. Cooperation and video meetings with HR teams in other Northern countries. Cooperation with communications and IT team. Documentation, reporting.	Main task to communicate concern strategy in the org. The strategy is made sense of in the communication team and with the business units in frequent discussions and meetings. Participates in planning the communication on basis of concern strategy clock. Participates and influences so that people in communication situations think of the strategy. Multi-channel-communication, also two-way communication, f-to-f, social media forums, CoPs (Communities of Practice) and cross-functional groups. News, articles, stories of successful strategy implementation cases, videos, own tv	HR practices are closely linked to strategy implementation. Organising performance appraisals and development discussions with personnel and collecting the results. Organising training and follow-up. Following employees' engagement and satisfaction with strategic performance. Gathering and processing employees' ideas, aspirations and suggestions. Rewarding performance and achieving of key initiatives. Supporting managers and middle managers in strategy implementation.	Practical communicating of strategy towards all directions in and out of the organisation. Participating in the planning of the local strategy and strategy work in own team. Near cooperation with executive team. Knowledge search and planning of the strategic information in different channels. Participating in strategic workshops. Follow-up of campaign results and sales
Knowledge of strategy	Own HR team and intra	Official knowledge comes from concern CEO and is made sense of in own Communications team and with Business Units.	Strategy is actively and constantly communicated and discussed through several channels. CEO presents strategy all personnel and the presentation is videoed globally. Superiors discuss strategy individually with every subordinate.	Trough daily dialogue and cooperation with own superior, local executive team and own team.
Perceived role/ empowerment	HR identity, serving people, happy people part of the strategy	Knowing and understanding strategy and the organisation makes the work easy and fun.	Strategy work is part of daily tasks and the backbone of all work. Good results increase commitment, engagement and satisfaction.	Proactive, courageous, independent, strong through cooperation and knowledge sharing

5.3.5 Management assistants' roles in strategy processes and implementation

The interviewed management assistants were aware that their role and position in the organisation between the management and employees was most strategic even though only one of the assistants perceived the working role as strategic. The assistants could use their comprehensive communication skills to facilitate the managers' work, the implementation of strategy and knowledge sharing up and down in the organisation. The assistants had a highly positive attitude to the strategy; they described it as 'the most important thing in the business', 'behind all actions' and 'the be all and end all'. They felt that the strategy was a useful tool for prioritizing and planning both one's own and the organisation's work.

> "Understanding the organisation's business, having the big picture makes the work easy and fun" (Management Assistant, org 7)

> "You need to take responsibility for the big picture" (Management Assistant, org 6)

Mantere (2003) similarly found this group of supporting practitioners in his dissertation of employees' social positions in the strategy process. He categorizes these facilitators and strategic support persons as *empowered champions* and argues that these facilitators are ignored as the strategic resources they are.

> "You need to know the goals to be able to prioritize and plan the schedule, meetings, events, practical arrangements, translate the messages to all units and countries" (Executive Assistant, org 2)

> "Well-planned schedule is the basis for effective strategy process" (Executive assistant, org 6)

> "I help everywhere I can, it is important you have the big picture, you know the entire organisation and respect everyone." (Management assistant, org 7)

> "Confidence and trust is important in the cooperation. I have superior's full authorization to work independently." (CEO Executive Assistant, Org 8)

> "Assistants are responsible for the informal strategic communication" (Head of Support Office, Org 10)

Three CEO assistants' roles in strategy processes are summarized as they themselves described them in Table 14. It is relevant to notice that they had tasks in all phases of strategy process from strategic planning to implementation and monitoring and updating. They had critical skills and knowledge that could be used to develop strategy processes and strategy implementation, such as project and time management, coordinating, organising, communicating and facilitating.

TABLE 14 Management Assistants roles in Organisation 1, 2 and 6

	CEO Executive Assistant, Organisation 1	**CEO Executive Assistant, Organisation 2**	**Executive Assistant /Communication officer, Organisation 6, local plant**
Tasks, practices interaction in strategy process	Supporting strategic planning by searching information and preparing presentations for decision making Organising Executive and Extended Executive Meetings, keeping the minutes Scheduling the strategy process and planning strategic material, information and communication together with management. Planning, organising, facilitating and participating in Road Shows and other strategic events Administration of projects together with Project Manager Summarizing the CEO info in Intranet Interacting up and down in organisation	Facilitating, organising, coordinating both managerial and organisational strategy work Summarizing, translating, explaining strategic information in the organisation Prioritizing according to the strategy Scheduling, organising strategic meetings, events Practical arrangements Communicating in global environment	Annual planning of strategy process according to the strategy content and themes for Executive team, facilitating decision making, managing the schedules and actions to be taken Information of strategy in different channels weekly, calling and organising monthly info meetings, strategic communication up and down in the organisation, communicating and explaining the strategy to employees, actively collecting and informing feedback Together planning the key priorities, objectives and actions, monthly action plans, the entity of organisation meeting schedule Together planning, implementing and informing of projects and developing processes Communication with interest groups, extranet, meetings, events, presentations, follow up
Knowledge of strategy	CEO, Executive team	CEO, Executive team	Subsidiary HQ / Executive team of local plant
Perceived Role / Empowerment	"Active, committed, participating" "Strategy natural part of daily cooperation and dialogue" "Scheduling makes it possible to plan the work	"In front row seat, but not participating in decision making" "Insider, knowing all the strategic information, seeing the big picture" "Understanding the strategy makes the work more meaningful"	"Everything is about the strategy" "I am an important link between management and employees" "Trust and respect are the corner stones" "Good leadership is needed, but I work independently and actively according to the strategy and our goals"

5.4 Modeling of middle-level practitioner's role in strategy work

The different forms of mutual *interaction* towards all directions vertically and laterally were experienced as most essential for an empowered role in strategy process and implementation. Furthermore, the *ways* of interaction were described to be important for the experienced empowerment, i.e. how the practitioners were encountered and treated. These expressions of empowerment are consistent with Mantere's (2008) suggestion of a reciprocal view of strategic role expectations and conditions enabling middle manager agency in strategy process, for example respect, trust and inclusion.

The empirical evidence in this study thus suggests the empowerment experienced by practitioners is interwoven in the *social relationships* of the cooperation and related to strategic *knowledge* and *interaction* as stated also by Foucault (1977) and Ibarra and Andrews (1993). Within these relationships learning and action are created in dynamic, tightly connected processes (Small & Sage 2005/2006; Weick 2001). According to these observations the practitioners' roles in the empirical data were studied in relation to the level of knowledge they experienced they had of the strategy and different forms of interaction they described they participated in strategy processes. The roles are placed in a matrix combining these elements in Figure 7. The ranking is based on the researcher's evaluation of the interviewees' expressed perceptions.

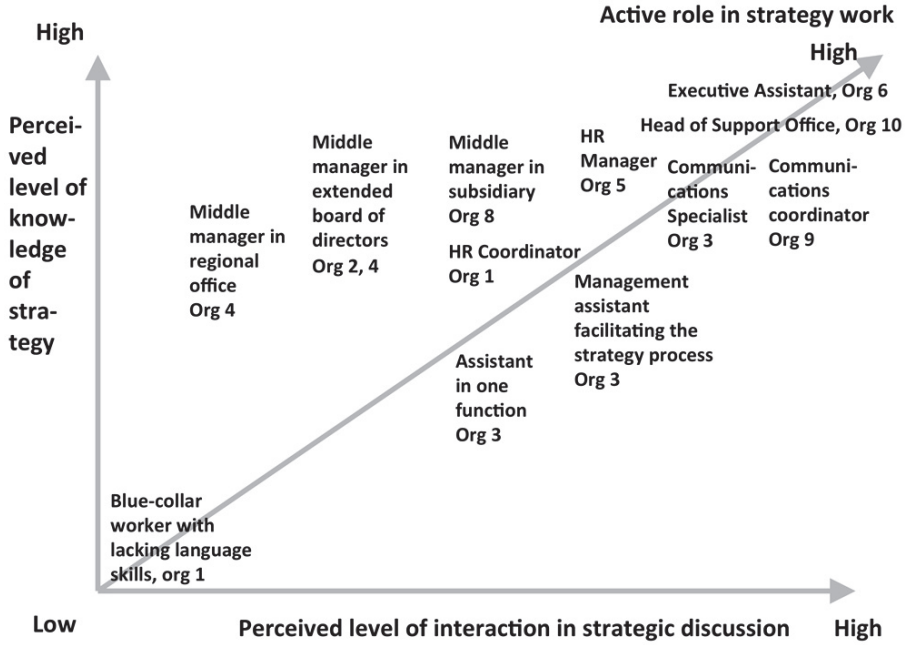

FIGURE 7 Practitioners' roles from the empirical data placed in a matrix combining perceived level of knowledge of strategy and interaction in strategic discussion.

Practitioners' positions in the matrix varied depending on the perceived level of strategy knowledge and interaction. Middle managers in regional offices (org 2 and 4) could have central strategic knowledge and still perceive their role in strategy work as inadequate because of missing sensemaking and support, whilst middle managers in subsidiaries (org 2, 8) perceived the interaction with parent company higher and their role as more active. Middle managers participating in the extended board of directors obtained more knowledge but did not experience it was enough (org 4). Middle managers risked a silo perspective to knowledge (org 2). These notes are in line with research stating that it is not enough for managers to have strategic knowledge to be able to engage in implementing activities, but it is also essential to have a central and boundary-spanning position in organisational networks (Pappas & Wooldridge 2002; 2007).

Assistants only facilitating the implementation processes without working in direct contact with the executive team, score lower because they did not have much knowledge of strategy content, even if they were active in the interaction when implementing the strategy (org 3). Of all studied practitioners, the most active and empowered roles, perhaps surprisingly, were possessed by management assistants working intensively with top management, planning and mastering the strategy process and the communicating towards all directions in the organisation and thus having both the big picture of strategy content and organisational processes with the power of acting in these matters. The practitioners scoring highest in strategic knowledge and interaction perceived their role as empowered and significant.

The matrix explains rather well a big part of the roles in the data, but is not comprehensive. In the data there were also middle managers and practitioners with strategic knowledge and good interaction experiences, but a passive or even negative role in strategy process (org 2). Pappas and Wooldridge (2002) noted similarly that managers may be extremely knowledgeable about the strategy, but if they are not well positioned in the prevailing social network, it is unlikely that the firm will be able to capitalize on their knowledge. It is clear that the social reality in organisations is too complex to be explained with one or two, even though elementary factors.

This finding is supported by several studies, e.g.: Westley (1990) noted that inclusion in strategic discussion did not necessarily guarantee satisfaction, Stensaker et al (2008) stated that successful implementation required, in addition to participation in planning and sensemaking activities, consistent action based on a shared understanding of changes. Kohtamäki et al. (2012) noticed that participating in strategic planning had not direct impact on company performance, but was linked to personnel commitment, which further had impact on company performance. Regnér (2008) suggests that linking together several elements of success such as capabilities and individual practices through processes of interaction and activities nourishes creativity and dynamic capabilities generating organisational assets and

promoting competitive advantage. Weick and Robert (1993) noticed that the organisational performance was most reliable in an organic system of social action, interaction and sensemaking. The findings are in line with the literature emphasizing respect towards and belief in people, interaction and cooperation (Hrebiniak 2006; Johnson et al. 2003; Mantere 2003; Regnér 2008; Weick 2001).

However, these results and the literature underlining interaction in strategy process is minority in strategic management literature, as the main focus is on strategic planning, managerial decision making and the contents of strategy. Mainstream implementation literature is concerned with performance instead of communication (Furrer et al. 2008) and the most often mentioned recommendations for managers to develop implementation have been about controlling, managing or organising resources (Aaltonen 2007) instead of interacting with employees.

Drawing from the data and the literature knowledge and interaction emerged as the most critical elements to construct of the practitioner's empowered role in strategy process and implementation. The practitioners' roles in strategy process and implementation require continuous both formal and informal interaction in the organisation's network in which they are positioned and which they can use to obtain knowledge. Through this interaction the practitioners can build the feeling of significance, competence and empowerment. Just as strategy is not merely a plan or a document but 'something people do', the practitioner's strategic role is not just a job description, position or status, but instead action and interaction between people about the strategy and what it means for their work and in all directions in and out the organisation.

The findings encourage constructing an 'ideal' practitioner role, against the mainstream literature, constituting of empowered and aware employee activity and continuous action and interaction about strategic goals and the corresponding practices. The conclusion is consistent with notions of Carter et al. (2008), Hrebiniak (2006) and Weick (2001) stating that strategy implementation is cooperation where trust, action and interaction are the base in the socially constructed networks.

The analysis of the practitioners' perceptions in the empirical material indicates clearly that an active role in strategy work increases the feeling of empowerment and significance, and thus possibilities to plan and develop one's own work towards more effective strategy implementation. Particularly crucial is the middle-level practitioners' potential in strategy work within their boundary spanning position in the cooperation. The elements and the linking actions are illustrated through a construction in Figure 8.

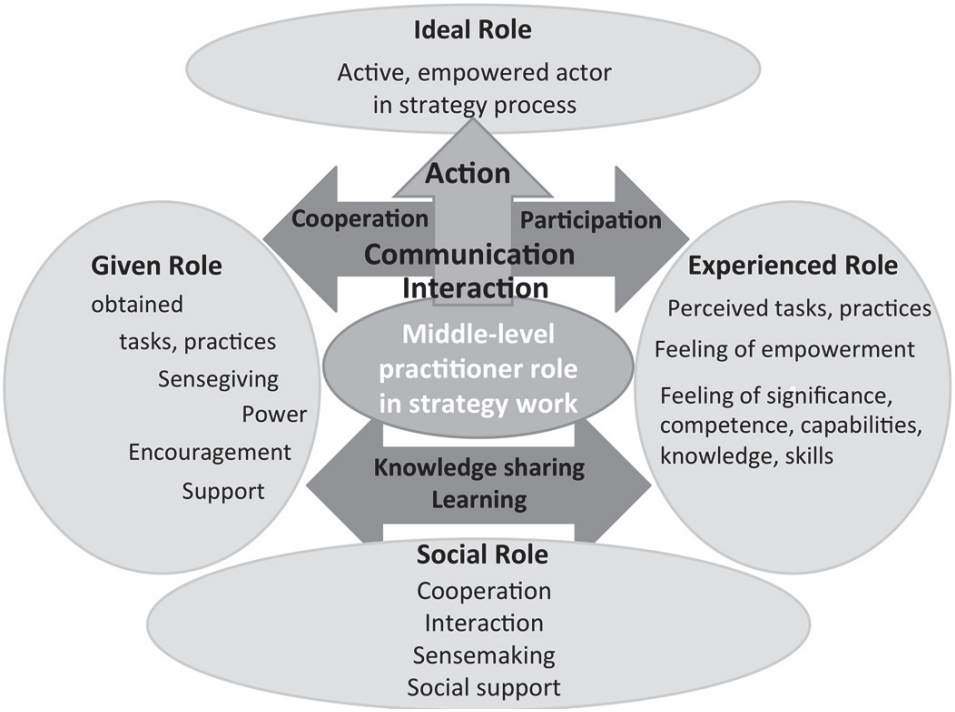

FIGURE 8 Constituting the role of the middle-level practitioner in strategy process

5.5 Conclusion and evaluation

The results contribute to strategic management literature by increasing the understanding of middle-level practitioner's role and empowerment in strategy process providing missing pieces to understanding of micro-level perceptions of practitioners. The research portrays a comprehensive picture of the practitioners' everyday realities in strategy work and contributes to knowledge through a theoretical reasoning emerging from the empirical findings and seeks a useful development of practitioners' working practices from their own angle (Charmaz 2006; Van de Ven 2011). The findings support the previous results on the importance of middle managers mediating the strategy, but additionally finds insufficiently recognized groups of practitioners, for example management assistants, having knowledge of strategy and skills that could be used more purposively in all the phases of strategy process to facilitate and improve strategy implementation.

Against mainstream strategic management literature, this research underlines the magnitude of cooperation, interaction, knowledge-sharing and sensemaking as essential elements of practitioner's empowerment in strategy processes. It is suggested that the practitioner's empowered role in strategy

implementation constitutes of multilevel, continuous interaction in the organisation to obtain knowledge and understanding of the strategy and its meaning for the daily practices but requires trust and mutual respect among managers and practitioners enabling a good cooperation.

The practical implications of the research are prominent giving practical tools to develop working practices when implementing strategy. The most important advice to managers and practitioners is to recognize the major role of the interaction needed in order to enable practitioners an empowered role in strategy process and implementation and to encourage the practitioners' valuable skills of communicating the strategy, organising, coordinating and facilitating strategy implementation. Even though working cultures are developing, work is still divided into managerial planning and organisational implementation without sufficient interaction and sensemaking. Managers do not see practitioners as potential strategic actors and correspondingly, practitioners do not believe they can play an important role in strategy work. Knowing and understanding the meaning of strategy in one's own work increases the practitioners' possibilities to see the big picture, feel empowerment and significance and get engaged. Practitioners would gain by using the strategy as a practical tool to focus on the most important tasks and reduce the less important ones not related to the strategy. However, most practitioners do not yet perceive strategy as a positive or useful tool. There are still taboos in strategy work, along with a polarization between management and personnel as Knight and Morgan (1991) and Mantere and Vaara (2008) argue. Open dialogue between managers and employees is the only way to genuine development.

Despite the contributions there are several limitations and more qualitative empirical studies are needed to better understand employee role and empowerment in strategy work, constituting action and developing strategy implementation. The research recognizes more similarities than differences in different kinds of organisations' strategy processes, still the studied participants and cases represents only a small amount of practitioners and organisations operating in Northern Europe, even though several of them part of global concerns. The participants were carefully chosen, meaning that that the passive, reluctant and negative persons were not chosen to be interviewed. Hence, not all problems and tensions were captured. However, the aim was not to find the problems, but to understand the positive and successful ways of working. This research did not criticize the taken-for-granted practices (Vaara & Whittington 2012), even though it also would be useful. The main method to gather data was semi-structured interview, which makes it possible to capture the emic perspectives, but the limitation is that people tend to answer more positively than they behave in reality. The research focuses only on a part of strategy process, i.e. the implementation, even though a huge phenomenon per se. The need for understanding the employees' part in the whole process is eminent, but the implementation is of major importance for the

employees and the reality in today's organisations is that employees do not plan the strategy together with the managers.

Strategic Management research needs to understand in more profound how to empower employees' in strategy work in order to improve strategy implementation in the messy reality of organisations with global and local, vertical and horizontal relationships and cultural differences in ways of thinking and acting. More cross-disciplinary research is needed to unravel the problem of employees' empowered role in strategy work and a successful strategy implementation.

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SUMMARIZING THE FINDINGS IN THE ESSAYS

In the essays I studied the research question procedurally from five different but interconnected angles in order to understand the dimensions of the complex phenomenon of a practitioner's successful role in strategy implementation. I summarize briefly the objectives and findings of the essays and compile them in Table 2 (Appendix 2).

The *first* essay explored empirical data of perceptions of employees' role in strategic change in six case organisations. In this essay I attempted to figure out the 'big picture' of the phenomenon in theory and practice, compiling organisational, managerial and individual factors that were perceived as affecting positively the employees' roles in strategic change. I tried to understand the characteristics of strategic change from the viewpoint of the employee in practice. The findings were studied through the lenses of strategic and change management literature and garnered together. The findings tell about employee's role in the midst of multilevel organisational changes from top-down dramatic changes to organic micro-level changes increasing the feeling of empowerment, activity and stability through enabling planning of the own work.

The *second* essay examined in more profound the factors that were experienced as related to employees' engagement in strategy implementation. The literature review on antecedents of employee engagement bridges traditions of strategic management and organisational behavior and psychology. Drawing on the empirical findings from six organisations and the literature a holistic model was constituted in order to better understand central concepts related to engagement. The findings portray employee's engagement as mainly constituting of basic elements of action, cooperation, encouragement, support and trust. Frequent interaction, knowledge-sharing, interpretation and cross-functional dialogue are similarly needed in successful strategy implementation binding together people, knowledge and competence as well as building engagement and open organisation culture.

The *third* essay studied middle-level practitioner's perceived roles in strategy processes in international environment in eight organisations, large and middle-sized global concerns' parent companies and subsidiaries and small private owned and non-profit organisations. The essay recognizes middle-level practitioners' critical communicating , facilitating and coordinating skills and practices in boundary-spanning positions that enable playing a key role in building common understanding of strategy and trust between organisations when implementing global strategy in local environment. The practitioner's role can be essential in knowledge sharing and creating processes both within intra and inter organisational relationships. The practitioners' practices can contribute greatly to the formulation of the local strategy aligned with the global strategic guidelines.

The *fourth* essay was a longitudinal action research to explore strategy implementation and employees' engagement in a real life strategic process of a cross-functional cooperative project in Sales and Service in a multinational headquarters. Action research increased a deeper understanding of the fundamental elements of employee's engagement in successful strategy implementation processes. In a complex web of cooperation networks not even practitioners' great engagement and an open discussion culture were enough for a successful strategy implementation process when the most basic elements of interaction and cooperation between practitioners and the direct manager failed. Only a dynamic model is found to be able to describe a successful strategy implementation process. The constructed model is compared with Engeström et al.'s activity theory (1987 / 1999 / 2001) in order to better understand how practitioner's activity can be constituted in strategy processes.

In the *fifth* essay I studied approach middle-level practitioner's perceived role and empowerment in strategy process and implementation in ten case organisations. Using narrative methods helped me to understand the basic elements of practitioner's perceived empowerment and strategic identity. Instead of functional roles according to mainstream strategic thinking it was found that practitioner's role constitutes of a magnitude of cooperation, interaction, knowledge-sharing and sensemaking enhancing the empowerment. Empowered middle-level practitioners were found to have skills and potential to communicate the strategy in the organisation and facilitate the success of implementation processes through multiple social practices in organisations. The practitioner's role is much determined by the strategic knowledge they obtain and the level interaction they have in the strategy process.

The findings of the essays are summarized in Table 2 and the analysis is continued in the grounded theory process of this dissertation report.

TABLE 2 The focus and findings of the five essays

Essay title	Focus	Findings
1 Employee's role in strategic change	The essay explores perceptions of employee's role in strategic change in six case organizations.	✓ Strategy processes are top-down and the employee's part is the implementation of an elsewhere designed strategy ✓ The role of the employee in strategic change is multidimensional and complex demanding dramatic, systematic and organic change adaption in an enabling and encouraging environment ✓ Employees have skills and potential to play a more active role in strategic change but they need support and knowledge-sharing ✓ Open discussion culture and good cooperation are perceived as most essential for employee's active role ✓ Stability for employees can be created with enhancing their active role in strategy process, so that they can pro-actively plan the actions needed in strategic changes
2 Identifying factors experienced as related to employee's engagement in strategy implementation	Empirical data are interpreted in six case organizations and literature reviewed in order to find elements that are perceived as related to employee engagement in strategy implementation.	✓ Drawing from literature and the empirical findings a holistic model is constituted interpreting the essential elements and their relationships related to employee engagement in strategy implementation ✓ Employee engagement in strategy implementation is a complex, multi-level and reciprocal phenomenon which can be understood only with help of a dynamic model ✓ Most fundamental factors related to employee engagement concern action and interaction building together open organization culture
3 Middle-level practitioner's role in strategy process in international environment	The essay examines middle-level practitioners' perceived roles in strategy processes in international environment in eight organizations, global concerns' parent companies and subsidiaries.	✓ Frequent formal and in particular informal interaction, are found critical for the middle-level practitioners' active implementation role in strategy processes in international environment ✓ Middle-level practitioners can act as multi-level communicators, boundary-spanners and supporters of strategy implementation through increasing the common understanding of strategy, organizational learning and trust creation ✓ The practitioner's role can be essential in knowledge sharing and creating processes in intra and inter organizational relationships.
4 Developing strategy implementation and employees' engagement in cross-functional cooperation in Sales and Service - Action Research in a Multinational Headquarters	The essay studies through longitudinal action research employees' engagement in implementation of a strategic cross-functional project as action research in one case organization.	✓ Longitudinal action research and micro-level observation in real life strategy implementation process provides deeper understanding of employees' engagement ✓ Most elementary for successful implementation proved to be basic elements of action and interaction in particular between practitioners and the direct managers ✓ Only a dynamic model can describe successful employee activities in the implementation of strategy. ✓ Engeström's activity theory gives new pieces to recognize essential elements of activity systems both in the current case and also more generally.
5 Middle-level practitioner's role and empowerment in strategy process and implementation	Middle-level practitioners' perceived roles and empowerment in strategy processes are studied in ten case organizations through narrative means.	✓ Formal and informal interaction and the obtained level of strategic knowledge are found as experienced the most essential elements of an active and empowered employee role in strategy process and implementation. ✓ Middle-level practitioners are found to have skills and potential to communicate the strategy in an organization and facilitate common understanding and learning in strategy processes ✓ Strategic awareness and empowerment are found to enhance the practitioner's feeling of significance, possibility to plan own work and act independently when implementing strategy