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The process and practice of participation in strategy making

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Abstract

The concept of participation in strategy making is poorly understood in the literature. This study seeks to address this by considering how participation is used as part of strategizing. It considers the use of participation by strategy practitioners in strategic episodes that take place over time. Using a single case study approach, semi-structured in-depth interviews with senior and middle managers are combined with direct participant observation and document analysis to abductively explore how participation is used in a third-sector organization. The changes in personnel and role trigger listening exercises and an openness to new strategic discourse. This results in an iterative cycle where individual meaning is formulated, before being explored in strategic episodes, then confirmed against collective understanding. This is presented in a three-stage iterative process model of participation in strategy. Further research is needed to explore the discursive and sociomaterial aspects of the practices used.

Keywords: Participation, Strategy as practice,

Word count: 6,982

Introduction

No single CEO or strategy team can know it all. Organizations are beginning to understand the value in involving others in the creation of strategy, facilitating a movement towards the opening of strategy work (Whittington, 2019). There is mounting evidence that opening the strategy process to a wider audience through greater inclusion and transparency can have significant positive benefits for firms (Mack and Szulanski, 2017). Sitting alongside emergent strategies and autonomous strategy work, participation is used to increase commitment to strategies (Laine and Vaara, 2015, p. 616), while an absence of participation has a negative impact on the quality of the resulting strategy (Floyd and Wooldridge, 2000). Despite this, within the academic literature there is currently a very limited understanding of how participation informs and shapes strategy work in organizations (Hutter *et al.*, 2017). This is in part because the concept is inconsistently used by scholars and lacks clear definition. This paper answers the question of how participation is used as part of a strategizing process. It aims to improve our understanding of participation in strategy by developing a framework of participation strategy making.

The concept of participation has many different interpretations (Macpherson and Clark, 2009), with the term participation often used interchangeably with inclusion (Mack and Szulanski, 2017). Participation refers to the elicitation of input, contributions, feedback, or buy-in to strategic decisions during the formulation of strategy. While participation can refer to the involvement and practices of senior actors at the executive or board level, i.e. those expected to 'own' strategy (Fiegener, 2005), it is more commonly used as a term to refer to the inclusion of a wider set of actors from middle management (Ketokivi and Castañer, 2004), frontline employees (Balogun, Best, *et al.*, 2015), external actors such as strategy consultants (Seidl and Werle, 2018), or wider stakeholders (Maitlis and Lawrence, 2007). The wider and more inclusive practices tend to be integrated under the "open strategy" concept (Birkinshaw, 2017), and therefore participation could be considered part of inclusion. Hautz *et al.* (2017) argue that inclusion is more than mere participation, requiring sustained stakeholder interactions and a sense of community. It is variable and contingent, dependent on supportive circumstances and reliant on practices such as controlled agenda-setting and issue-framing. Organizations need to have sufficient reflexive capabilities to integrate the feedback into organizational structures. In papers that place participation separate to inclusion, participation is a term usually used to refer to a set of specific practices or behaviours (Gegenhuber and Dobusch, 2017), such as Chief Executive Strategy presentations, 'jams', wiki conversations etc. (Dobusch *et al.*, 2019).

Participation has received relatively little attention in the strategy literature (Laine and Vaara, 2015). Historically, research has seen strategy as the preserve of the top-management team, and has consequently failed to consider participation beyond considering how personal demographic or professional backgrounds impact participation between top managers (Chatterjee and Hambrick, 2007). Participation of middle managers (and others) can be seen as time consuming and resource demanding, as such there needs to be a clear understanding of the value participation has to the final realised strategy as well as clarity for managers in terms of what participation does, and how they can 'do' participation efficiently (Laine and Vaara, 2015, p. 618). There is a need to more fully understand the impact of material artefacts, technologies and embedded practices that enable and constrain participation. By exploring the use of participation across a strategizing process, this study contributes to this understanding.

This paper begins by discussing the convergence of the practice and process literatures, exploring how the two perspectives provide complementary ideas. It introduces key themes within participation in strategy, considering in more depth the relationship between participation and practitioners, and the strategic episodes within and around which participation occurs. Following this discussion, the case study methodology is discussed, prior to the details of the case setting and findings. The discussion explores the influences of organizational structure (or re-structure) and the iterative nature of the process, before introducing a new framework of participation strategy making, providing an original contribution to our understanding of the concept.

Practice and process research

The idea of strategy as a process has been explored separately from Strategy As Practice (SAP) since the 1970s (Pettigrew, 1977). Current thinking is beginning to acknowledge that the two fields are complementary, rather than competitive (Burgelman *et al.*, 2018). Kouamé and Langley (2018) explain that strategy process and practice research share a concern with broadly similar phenomenon, describing how "process" and "practice" are used as labels for different forms of theorizing. Process research shows temporal linkages of events over time. These can be process theories, but also variance theories that express relationships between variables. Practice research comes with a different set of theoretical and ontological assumptions, seeing actions as being socially situated and mutually constructed. SAP shares many characteristics of the strategy process literature but seeks a better understanding of the microlevel processes and practices constituting strategy and strategizing (Mantere and Vaara, 2008, p. 342). While the starting points may be different, the two approaches are very closely related:

"First, long-term processes of strategy development over time may embed multiple practices or multiple enactments of the same practice (eg. repeated management meetings). Second, particular practices can have distinctive processual structures (eg. a particular instance of the practice of "strategic planning" can be viewed as a process that plays out as a sequence of events). In other words, the empirical concepts are distinct, but highly interrelated." (Kouamé and Langley, 2018, p. 562).

The unification of practice and process acknowledges the inseparability of actions with temporality. Time has been shown to significantly impact strategic decision making and change (Crilly, 2017; Kunisch *et al.*, 2017). It has been found to be a source of tension between different organizational actors (Dougherty *et al.*, 2013), and has been directly linked to materiality in relation to strategic decisions (McGivern *et al.*, 2018). A way to link micro-practices with organizational outcomes, progression links how micro-activities interact recursively with macro-level factors over time (Kouamé and Langley, 2018). Many studies that adopt progression incorporate cyclical or recursive temporal linkages, reminiscent of structuration process (Denis *et al.*, 2001; Jarzabkowski, 2008; Tripsas and Gavetti, 2000). A progression linking approach will often decompose timelines into blocks or phases, which is described in Structuration as "temporal bracketing" (Kaplan and Orlikowski, 2013). This paper therefore sets out to consider practices enacted over time, something rarely considered in SAP research to date. Bringing together a number of previously disparate themes, Burgelman et al. (2018) provide a combinatory framework for strategy as process and practice, which synthesises key aspects of both approaches. This presents strategy formation as an iterative cycle between strategizing episodes and realized strategy. Episodes are triggered by issues, which are then enacted by actors (such as managers, consultants or employees), who achieve the realized strategy through practices, which enable or constrain the realized strategy.

Participation in strategy work

Pressures for external legitimacy and internal commitment in organizations often result in decoupled planning documents that have little substantive content but are designed to please outsiders (Stone and Brush, 1996, in: Abdallah and Langley, 2014, p. 3). Participation in strategy work increases commitment in organizations, which helps strategic implementation (Mantere and Vaara, 2008). A lack of participation in strategy formulation, as well as being a sign of organizational inequality (Knights and Morgan, 1991), can lead to poorly developed strategies (Floyd and Wooldridge, 2000), dissatisfaction in excluded groups (Westley, 1990) and difficulties in implementation (Mintzberg, 1994). Not a single or fixed concept, participation could be consultation on a specific issue, involvement in decision making, or more generally as a mechanism for information exchange (Ashmos *et al.*, 1998). Breadth, timing and mechanisms of participation are all components. These encompass involvement and participation in strategy development, access to strategic information, perceived exclusion from strategic decision-making, and the type of formal and informal communication channels within the organization (Carney, 2004).

Studies have found that participation is impacted by organizational predisposition (Ashmos *et al.*, 1998) and structure (Carney, 2004). It is less likely to occur in highly rule orientated organizations but more likely to occur in organizations with lower past performance than those with higher past performance. Flatter hierarchies enhance downward communication flows, which permit more involvement in strategy development. Whereas more complex (or taller) structures tend to be perceived as excluding from strategy and have poorer communication and a lack of access to information. Participative strategies are often used consciously and intentionally to actively resist the traditional hegemonic discourses. "Mystification, disciplining, and technologization are the very means through which hegemony is established and legitimized in strategy work" (Mantere and Vaara, 2008, p. 353). However, hegemonic strategy processes may become self-destructive in contexts calling for wide organizational support. Discourses both reflect prevailing organizational praxis and serve to legitimize or delegitimize particular practices (Mantere and Vaara, 2008).

While strategic planning may serve as a means to develop consensus and promote commitment among organization members, plans can also play important roles in the legitimation of the organization and its strategy with external stakeholders. Abdallah and Langley (2014) explore the challenge of drawing together diverse interests, particularly in pluralistic settings, and how ambiguity in strategic plans can do this, as ambiguous text can accommodate different perspectives of multiple stakeholders. Ambiguity is 'double-edged': it can initially engage diverse interpretations of strategy, but later lead to the questioning of it. Despite this, Neeley and Leonardi (2018) highlight the importance of knowledge-sharing among employees as being critical to strategy as a source of competitive advantage. This adds to the argument for increased participation in strategy, as knowledge sharing is a core component of "*doing strategy*" (Jarzabkowski, 2004, p. 529).

Practitioner role

Most SAP research is based on an understanding that the meaning attached to strategy is socially constructed, and therefore it is often studied in relation to specific groups rather than individuals (Johnson *et al.*, 2007). The executive, or senior management are often seen as strategy generators, while middle managers are viewed as implementers. Balogun, Best, *et al.* (2015) go further and consider how objects are used by frontline workers to bring strategy to life through their everyday activities. Regnér (2003) identifies the importance of role, but also the distance of the individual from the centre of control, finding that the closer managers are, the more formal and '*deductive*' the strategy making process becomes; those further out adopt a more '*trial and error*' approach. Mantere (2008) considers how role expectations of middle managers has a strong influence on what these managers do. Understanding that strategy extends across both levels and actors is important in deepening our understanding of the organization; it requires research that acknowledges the plurality of both actors and levels of analysis (Johnson *et al.*, 2007).

Globalization, growth of companies and increasing use of technology has seen a growth in numbers of middle managers in organizations. Middle managers are important for their ability to synthesize information and champion strategic ideas, as well as facilitating adaptability and implementing change (Rouleau *et al.*, 2015, p. 599). Acting as 'linking pins' between top and lower management, they are required to interact across departments, especially in decentralized and networked organizations. Communication technologies have changed the way middle managers interact with superiors, subordinates and their peers. While there is a natural focus on the upward and downward activities of middle manager activities, Rouleau *et al.* (2015) highlight the importance in the literature given to their lateral and multi-level relations when making sense of change. In an earlier study, Rouleau (2005, p. 1416) argues that the way middle managers participate in strategic change is different to top managers because, "given their hierarchical position, they do not share the same level of consciousness of corporate strategy" and that much of their action is focused on operational and practical issues. She does not however ignore the wider real-life contexts in which actors exist, and acknowledges the impact things such as gender, ethnicity, and profession has on meaning creation. Beck and Plowman (2009) show how middle managers encourage divergence in interpretations across hierarchical levels during the early stages of a strategic change initiative, yet during the later stages, tend to blend and synthesize divergent interpretations.

While most research expanding beyond the senior management team focuses on middle management, lower-level managers and employees are also key to organizational knowledge creation (Floyd and Lane, 2000). Ideas from lower-level managers help organizations adapt strategies in changing environments (Lovas and Ghoshal, 2000). What seems to be key is a reflexive relationship between individuals at different levels (Panayiotou *et al.*, 2019). This is especially the case for new CEOs, as constraints on changing senior leadership mean they are more likely to develop "strategic leadership constellations" which include individuals from the top tier, middle and lower levels (Ma and Seidl, 2018). Exploring the interactions across all three levels, Jarzabkowski *et al.* (2018) identify a three stage, iterative cycle of performing actions, reinforcing actions, and then (following a breakdown) reflective actions that lead to new performing action cycles. While this was in response to mandated change, there are important implications for participation in strategy formulation that involves levels beyond senior management.

Given that participation involves multiple actors, from different levels and different roles, it is difficult to always explicitly identify who could be called a strategist in a participation approach. Mantere and Vaara (2008) instead deal in subjectivities that can coexist simultaneously. Within actor groups, there are "interpretative communities" which have their own cognitive frames and therefore interpret change differently. Frames of reference can come from shared history and performance, business context, and most importantly, the nature of managerial roles. Balogun, Bartunek, *et al.* (2015) apply these in two contexts: relational and interpretive. Relational contexts are who the SMT 'sensemakes' with, usually due to colocation and frequent personal interaction. This usually leads to a common understanding through processes of affirmation or disaffirmation. Interactions with individuals more distant in the organizational hierarchy can also affect shared understandings, and can therefore be part of a strategy network (Whittle *et al.*, 2016). Interpretive contexts are the frames of reference used to construct the meaning of change events and actions, bound by cues and interpretations available to the collective. It includes shared assumptions, drawn on to interpret and understand how to respond to events. These contexts mean that managers do not just embellish a central organizational narrative about change, but actively construct alternatives (Balogun, Bartunek, *et al.*, 2015).

Strategic episodes

Strategic episodes are specific moments in time that deal with strategy, defined as a "*sequence of communications structured in terms of its beginning and ending*" (Hendry and Seidl, 2003, p. 176). These can include formal strategy workshops, away days or regular meetings that deal with strategic issues. Hendry and Seidl (2003, p. 177) argue that "*strategies are recursively reproduced by the very practices they produce*". There is a recent surge of literature investigating the roles of meetings in strategy (Jarzabkowski and Seidl, 2008), how meetings change or stabilise strategy and create shared views (Kwon *et al.*, 2014), how meetings enable 'strategic talk' and the production of strategic text (Spee and Jarzabkowski, 2011), and how emotional displays influence strategic discourse (Liu and Maitlis, 2014). Limitations exist in research that specifically considers the role of workshops, which may be considered distinct from meetings (Johnson *et al.*, 2010). Some focus specifically on 'strategic meetings' (Kwon *et al.*, 2014), while others consider that all meetings can have strategic uses (Jarzabkowski and Seidl, 2008).

Meetings are both temporally and spatially delimited from wider organizational activities. Seidl and Guerard (2015) identify five functions for meetings: coordination, sensemaking, political, symbolic, and social. Strategy workshops, a particular type of meeting taking place outside regular organizational routines, tend to be dominated by senior management. While workshops can be very useful for the creation of new ideas, these seldom transfer back into the organizational structure. This is in part related to the structural decoupling role that strategic episodes play (Hendry and Seidl, 2003). Meetings allow for the suspension of the ordinary structures and routines, which in turn allow for participants to communicate in new ways and gives a platform for reflexive strategic discourse. Johnson et al. (2010) finds that decoupling creates a liminal experience, which can lead to new ideas, driven by ambiguity and social limbo. Strategic episodes can incorporate other material elements and practices, which can help mediate and frame the strategic discourse. This might be the introduction of physical artefacts into strategic workshops to help actors visualise and craft strategy (Heracleous and Jacobs, 2008), or using stories and narrative as a discursive practice to help actors illustrate strategic intent and meaning (Küpers *et al.*, 2013).

The challenge is to understand how strategic episodes are used by practitioners in developing both individual and collective meaning in strategy making. This is no simple task, especially as the issues and concepts at work are complex and interrelated, such as problems created by conflicting discourses presented by different organizational actors, especially when social position, background or hierarchical position are considered.

Research method

Based on Yin's (2018) four design types, this study adopts ‘type 1’: a single case design. That is a holistic study with a single unit of analysis (an instance of formulating a new strategy) within a single case (a third-sector organization). The single-organization case study is an approach proven to have been successful, perhaps most famously by Pettigrew's (1985) study of ICI. Eisenhardt and Graebner (2007) advocate theoretical sampling of cases, over and above the need for the case to be representative or generalizable. Unusual cases make for interesting contexts because it allows for the study of a phenomenon in a more extreme setting, and so the context sheds a theoretical light that might not otherwise have been seen. It is currently not entirely common for organizations to involve large numbers of people in strategy formulation (Whittington, 2015, 2019). It is more common in third-sector volunteering environments because of the increased need to ensure volunteer engagement with the organizational purpose (Tucker *et al.*, 2013). Strategy development also does not happen on a continual basis. Therefore, finding an organization that happens to be starting out on a new strategy development process that involves elements of mass participation is not the easiest of things, especially at this allows for real-time, rather than retrospective, data collection. Advance notice of the impending formal strategizing process gave the researcher a unique opportunity to be able to gather data in real time, while strategizing activities were taking place.

Data collection

A combination of document analysis, interviews and direct participant observation were gathered, enabling cross-referencing of different data sources using the principle of triangulation (Yanow *et al.*, 2012). Three different sources of data can be used to check internal validity and verify findings from more than one source, providing for a richer insight into the phenomenon in question, as it can consider multiple perspectives (Brotherton, 2015). Eight semi-structured, in-depth interviews with individuals from either senior or middle management resulted in approximately seven hours of transcribed interview material. Approximately 22 hours of direct participant observation was conducted during a series of strategy workshops, with detailed field notes taken. Alongside this were additional notes taken from informal conversations with personnel from all levels within the organization, both paid staff and volunteer. Finally, this was supplemented with document analysis of 32 formal documents and over 245 emails pertaining to strategy work within the organization. Data was collected over a 9-month period, from November 2017 to July 2018, with retrospective access to email and document archives.

Data Analysis

Presenting and analysing data can be a particular challenge in qualitative research. In a single case study design, Eisenhardt and Graebner (2007) advise presenting a relatively complete rendering of the story within the text, using key illustrative quotes from informants, intertwined with the theory. This could also be described as “thick description”, and is a common approach in both strategy and organizational research (Balogun, Bartunek, *et al.*, 2015; Hydle, 2015; Ravasi and Canato, 2013). Following Berends and Deken (2019), results are initially presented using an inductive composition. Findings are presented chronologically as a recounted narrative that is not yet theorized. Doing so maintains the temporal coherence that it important in qualitative process studies (Langley, 1999; Pettigrew, 1990). This was then composed into a visual timeline of events (shown in figure 1), to aid interpretation in presenting the sequence of events.

The next step was to abductively move between theory and data in order to generate theoretical insights, an approach not unusual in SAP research (Maitlis and Lawrence, 2007; Werle and Seidl, 2015). This approach meant that, in the first-step, the data was not bias in terms of looking for specific theoretical issues, and therefore not seeing something because it did not fit a particular theoretical model. An abductive approach meant that where phenomena or practices were identified, these could be compared to the available literature. This iteration was continued until a saturation point, defined as "when additional data and/or additional analysis no longer add new theories or interpretations regarding the topic", was reached (Tight, 2017, p. 106). Data integrity was ensured through a process of triangulation, where multiple sources of data could be used to verify ambiguous findings (Yin, 2018).

Details of the case organization

The case study organization, Charity Ltd, is a registered charity and company limited by guarantee that has a history spanning over 150 years. It operates community services to young and vulnerable people, funded by a commercial operation that sells training and other services to both private and public organizations. In 2017, it collected income of over £101m, which is used to fund charitable output. It operates as a wholly owned subsidiary of a parent charity and is governed by a Board of twelve Trustees who are legally responsible for the governance and management of the organization. The Board is led by a Chairman, and includes three ex officio trustees, and at least three who are independent. One Trustee also holds the position of Chief Volunteer, acting as the volunteer advocate on both the Board and ELT. An Executive Leadership Team of nine are led by a Chief Executive Officer. Operationally, the company has four geographical regions led by middle management in a role titled Regional Director (not Board level). In addition to a team of employees, each region has circa 5,000-8,000 volunteers in frontline, lower- and middle-management roles. The organization includes a total of approximately 32,000 personnel across both paid and volunteer functions. The researcher has been involved with the organization for approximately eight years, in both frontline and lower-management roles.

Findings and discussion

A new Chair of the Board of Trustees was appointed in June 2016. An initial listening exercise in his first months in office identified a strategic disconnect in the organization:

"We needed to realign ourselves and bring back a commitment to charitable output, led by volunteers, and to therefore have a strategic discussion to decide what chartable output that should be." (Chair of the Board, June 2018).

At the time of their appointment, the Chairman also learnt of the intention of the CEO to depart. The latter's exit followed the completion of a restructuring process which had commenced in March 2016 and was due for completion in October 2016. This restructuring programme had looked to realign the Senior Management Team and functions with a five-year strategy covering the period 2015-2020. Whilst a replacement CEO was being sought an interim CEO was appointed for a six-month period, which included a three-month transition with the outgoing CEO.

Between November 2016 and March 2017 two new key appointments were made, namely a:

(1) Head of Strategy (who would later be placed on the Executive Leadership Team and renamed Director of Strategy and Communications); and
(2) Chief Volunteer (Ex-officio Trustee).

Similar to the Chair of the Board of Trustees, each incumbent spent a period of time learning about the management of the organization and listening to frontline level employees and volunteers about their experiences and understanding: "You listen to the mood", "I have taken these first six months to listen", "What I felt I needed to do was to ensure I understood better the needs, the challenges, successes etc." were all common responses when embarking on a new role in a new organization.

Shortly after taking up their appointment, the Chairman announced their own immediate objectives. These objectives framed a "Strategy Away Day" in July 2016 where Trustees and the SMT came together to "discuss where the organization should place itself in the 21st Century" (Chair of the Board – Annual Address – June 2017). The outcome of this event would enable parameters to be defined for the new CEO. This strategy day signalled a departure from the format of previous events which tended to be stand-up "presentations and papers outlining progress towards the 2020 Strategy" (Internal memo – November 2016). It brought together both the SMT and Trustees in a facilitated session where they could discuss and debate the future direction and purpose of the organization. Whilst not scripted, the Away Day tested whether the priorities of the Chair were aligned with the views of Trustees and the SMT:

"You get lots of ideas together, you start to look to coherence. It rather depends whether or not the Chairman knew what outcome he wanted before he went into the room… That's exactly what I had. I knew what the mood of the organization wanted. I had a pretty clear instinct what the outcomes should and would be." (Chair of the Board)

Participants were asked to discuss the direction they thought the organization should take over the next ten years. Organised in a combination of round table and small discussion groups, they were involved in collaborative idea development using flipchart paper and Post-It notes. This process led to the identification of themes and priorities which would become the basis for wider strategizing sessions in the organization:

"A lot of the themes that came up in that session are the types of things we are talking about now. They've been crystallised and shaped but we're not disembarking from what was discussed in July [2017] by the Trustees" (Director of Strategy).

While it is unclear if the themes were reinforced due to a pre-existing view or if it was a led process, what is clear is that the emerging themes went on to inform future decisions. For example, the priorities identified in July 2017 informed the recruitment process of the new CEO. These priorities are illustrated in the framing of the conversations after the CEO took up his post in January 2018, as shown in this extended quote:

"From day one, I made it clear that it was important that the precepts that I'd set out in my interview, were clear to everybody in the organization. So coming new into the organization, I had set out that volunteers are paramount. That I value the role and contribution of young people. And that I believe that the organization could do more to raise income to deliver improved services on the front line…And so I used that conversation piece, talking about my experience of being interviewed, entering the organization, and why I thought I was hired, to set up conversations. And that created a very dynamic narrative about historic perceived failures, opportunities and where the shared beliefs were." (CEO).

"Reaffirming things about directional travel. Things like community connectedness, the importance of volunteers. They're obvious things but actually the warmth of the reception to just voicing it demonstrated that we're hitting a connection." (Director of Strategy).

As a result of these two events, it was decided that there should be a "mass engagement" process, enabling as many people as possible to be "part of the journey" (Observation notes – workshop 1 – April 2018). Whilst the idea initially germinated following the very first Strategy Away Day, there was a pause in events to allow for the commencement of the new CEO in post. It was then quickly picked up again in January 2018.

"this is a strategy that intrinsically needs to be owned by the members [volunteers and employees] …the members needed to own the process… and so we determined that an engagement process was necessary." (CEO).

The flagship key set-pieces were 13 'Strategy Roadshow' events. These were held in eight locations, were led by either the CEO or Director of Strategy and Communications and were open to any employee or volunteer to attend. The events were largely structured around three core questions:

1. What makes you proud to be part of the organization?
2. What are we great at?
3. What do we need to do well to get to where we want to be?

While all roadshows adopted the same format, content from earlier workshops is re-introduced at later workshops, shaping the nature of the discourse through phrases such as "*we've heard that consistently in other workshops*", or "*there are some really clear consensus themes coming out from across the country*" (Observation notes – workshops 5 & 7 – April 2018). As the series of events progressed, the themes are refined, often by taking a comment made by a participant (such as a specific phrase), and then re-phrasing it back to the audience in language that would mirror the language used in other workshops and thus generating a common discourse (Observation notes – workshop 10 – May 2018).

The 13 roadshows were then supplemented by a further 21 local events which were run by middle management. The latter followed a format based on the national events, however, because they were hosted by local leadership (usually the Regional Director) they tended to be more specifically tailored to their local context. In addition to the two different types of roadshow events, eight online webinars lasting approximately 30 minutes and hosted by the Director of Strategy took place during the period 14 to 18 June 2018. These were designed to feedback on the responses received at the roadshow events, as well as gathering additional feedback from those unable to attend:

"With so many people getting involved and giving feedback, we've had huge volumes of input and are working hard to pull all the information together from which to create a new shared vision and mission… Before then, we want to share the key concepts that have emerged and how things are shaping up. This will give us the opportunity to gauge your reaction and comments and give you the opportunity to ask questions and give any further feedback" (Internal memo promoting webinars – May 2018).

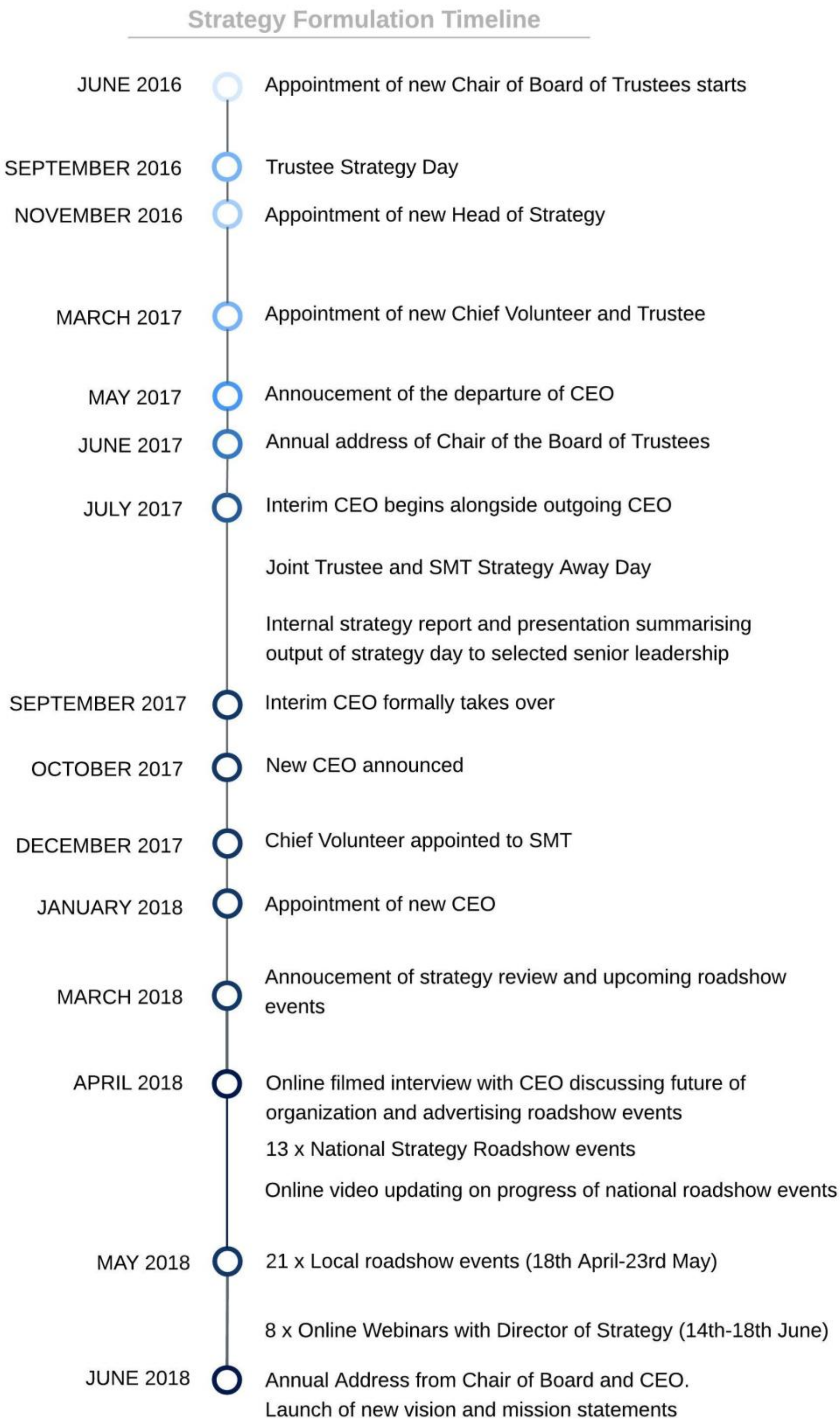

Figure 1: Strategy formulation timeline

As well these formal strategic episodes – roadshow events and webinars - video messages were used as a communicative tool. Videos were hosted on the company intranet and were used not only to inform viewers of the purpose of the events but also to generate awareness of the overall process and instruct people how to get involved. The engagement process culminated in the production of a new vision, mission and a set of value statements providing a whole new strategic purpose:

"if you're going to define purpose, the accepted formula for defining purpose, is vision, mission and values. And that these are healthily rehearsed mechanisms, into defining the first articles of strategy." (CEO).

These were formally announced to the public on 23 June 2018 at a large set-piece annual ceremonial event, which acted as a formal signal of a transference from strategic formulation to strategic implementation.

The trigger of (re)-structure

The case presents a new strategizing process that is triggered by the introduction, initially of a new Chair of the Board of Trustees, followed by a number of other senior personnel. This is significant, as a theme emerges of an explicit attempt to listen to and understand the organization when they started in their role (whether newly recruited, or appointed internally). There is some understanding of the relationship between organizational structure and strategizing (Carney, 2004; Jarzabkowski *et al.*, 2018), but this suggests that greater consideration needs to be given to the 'newness' of senior leadership. New personnel are perhaps more likely to adopt participation strategies, as these align with a listening or learning mentality. This adds an extra dimension to simply organizational predisposition as a precursor for adoption of participation strategies (Ashmos *et al.*, 1998). New CEO's are also more likely to develop networks of collaborators outside the top management team (Ma and Seidl, 2018). They are more likely to challenge the status quo and ask questions that might otherwise be taken for granted by established managers. In the words of one respondent: "When you have established people in there, in post for a long time…I think there is a tendency to continue to do what you've always done. And you sometimes need this catalyst to shoot you forwards or sideways" (SMT – interview – June 2018). This supports the argument that new starters are more likely to challenge or resist traditional hegemony (Mantere and Vaara, 2008).

Although there is a desire for key actors determining the strategizing process to engage as widely as possible, this does not mean that involvement should be in an uncontrolled way. Instead it is more about involving the right participants at the right time. This supports ideas put forward by Ma and Seidl (2018) that those involved in strategy will change, but builds on this by suggesting that teams get progressively larger over time. The very early stages of formulating strategy are still considered to be 'private', involving a small, but trusted group of people – often those with the explicit (and legal) ownership of the organization and its strategy. However, this is not just an issue of privacy. There is a concern about introducing too many people too early. In part because, without some measure of control, there would be too many voices, resulting in chaos. But also, the initial structure provided acts as a form of leadership of the process, reinforcing the legitimacy of those running it. For these reasons, it is inevitable that participation in strategizing gets progressively wider. This may not always be apparent, as the process of strategic formulation can often begin before a formal strategizing process is developed or announced. This supports other research that has identified a reflexive relationship between actors in different roles and at different levels (Panayiotou *et al.*, 2019).

However, it does not appear to be as simplistic as defining involvement at a particular time by specific job title or level in the organization. Participation is instead driven more by role and interest. Role in terms of those individuals with a requirement to either take ownership or be involved. This can include middle management being required to instigate local activities in what can be seen as “boundary-spanning” roles (Ravasi and Canato, 2013), which can sometimes result in role conflict (Floyd and Lane, 2000). However the inclusion of other levels both before and after the locally led events suggests that the importance of the “linking pin” role of middle management (Rouleau, 2005; Rouleau *et al.*, 2015) is diminished, as senior management take their message directly to wider levels, instead of being mediated solely through middle management. Interest comes in terms of how invitations to participate tend to only be taken up by those individuals who are interested. Inevitably, all participation activities rely on people being willing to take part. Those that do then form what could be described as an “invisible network” that influences strategy (Whittle *et al.*, 2016). These are often formed as a result of co-location and interaction, where affirmation and disaffirmation practices are used to develop shared understanding (Balogun, Bartunek, *et al.*, 2015). Those within the network then play a symbolic part in helping to “ready” others in the organization, as the events themselves illustrate to others that strategic renewal is on the way (Ates, 2019), even if those people have not directly taken part.

The impact of iteration

The case reflects the intertwined nature of process and practice when it comes to strategy work. It illustrates multiple bundles of practices enacted over time, and therefore further supports the view of emerging research that argues that process and practice of strategy cannot be separated (Kouamé and Langley, 2018; Burgelman *et al.*, 2018). However, what becomes apparent when the strategizing process is viewed holistically is the iterative nature of the process. Rather than being a continuous linear development (such as in Burgelman *et al.*, 2018), this study suggests that the formation of the strategy proceeds through an increasingly wider cycle of participation. Beginning with the Chair of the Board, individuals involved in the strategizing process go through stages of formulation, exploration and confirmation. In the first of these, views of strategy are formed using pre-existing knowledge or the organization or drawn from comparable experience. These views are the explored through discursive and socio-material practices in order to develop into a coherent and mutually understood message. Finally, the message is then confirmed through affirmation or disaffirmation practices against a wider audience. Should the response be affirmative, the cycle continues until eventually the strategy is publicly launched. If the message is disaffirmed, then the cycle can be repeated at the same level. This has the impact of re-forming the initial view of strategy. This would align with research that shows that views can change over time, but are re-informed by the interaction with others (Maitlis, 2005), while also suggesting that meaning can be made and given simultaneously (Introna, 2019).

Oscillation between individual and collective sensemaking is mediated through episodes, which provide an opportunity for participants to explore issues together in a protected space. While meaning can be explored at any time, episodes are especially important due to the structural de-coupling role that they play (Hendry and Seidl, 2003). This enables episodes to further enhance the ability for actors to share meaning across boundaries (Spee and Jarzabkowski 2011). Both within these episodes, and through casual interactions at other times, participation is used as affirmation or disaffirmation practices to validate decisions or viewpoints. Individuals seek to legitimate their views by seeking confirmation that they align with the wider organizational discourse (Mantere and Vaara, 2008). This could be across the distinct stages of the strategizing process, but also within a series of similar episodes, such as the national roadshow events.

The process of participation in strategizing

The process that has been outlined can be illustrated in the framework shown in figure 2. It shows a process model, framed around the three stages of formulation, exploration and confirmation. This departure from the mainstream literature shows participation not as distinct episodes, but as a continuous process. Individual understanding forms views on strategy. These formulated views are explored in strategizing episodes, where they can be tested against the views of other people. As the views are tested, they can be confirmed through affirmation and disaffirmation practices, but also used to produce a consensus among organizational actors – facilitating collective understanding of strategy.

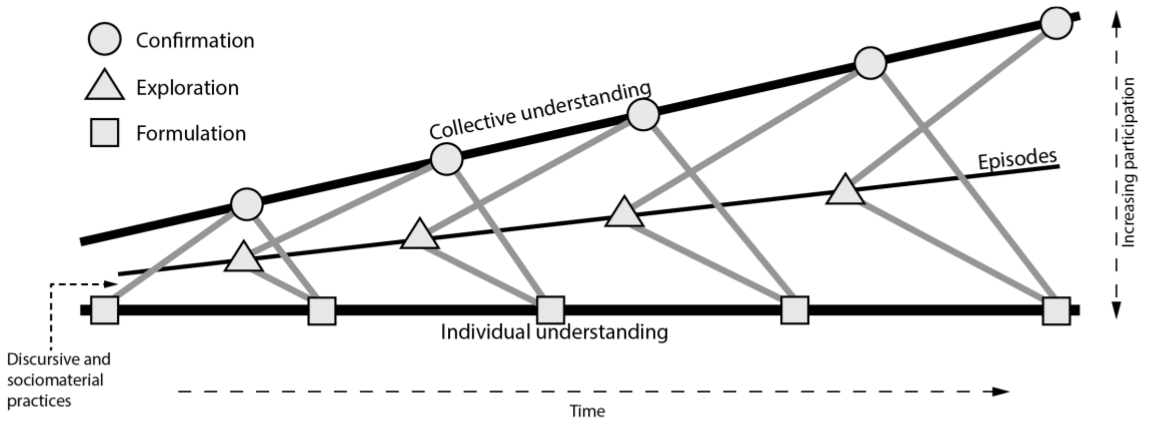

Figure 2: Iterative model of participation in strategy making

In order to understand uncertain and ambiguous situations, organizational actors draw on prior experience and knowledge within which they can frame strategic decisions (Kaplan, 2008). The frame repertoires of individuals can influence decisions over who is selected to be involved in strategic decisions (Seidl and Werle, 2018), suggesting that it might not be as simple as formal roles that dictates involvement. The diverse nature of organizations, and the teams within them, results in a broad range of frames that may have different meanings associated with them (Balogun, Bartunek, *et al.*, 2015). These need alignment, which is achieved through discursive and sociomaterial practices. For example, this study supports that the production of strategic texts in the form of strategy documents or presentations would have the effect of 'fixing' or 'freezing' a strategic concept and shared understanding for a period of time (Jalonen *et al.*, 2018), as these are generally produced as part of the confirmation process, prior to a new cycle beginning. Increasingly, sociomaterial elements can exist in a digital sphere, seen in this case through the production of videos and webinars. These can be used as part of legitimating strategies to privilege some discourses over others (Glozer *et al.*, 2019).

Conclusion

This study contributes to our understanding of how participation in a strategy formulation process works within an organization. Participation can be used as part of an iterative process to formulate, explore and confirm the meaning of individuals, and later collective groups. This study highlights that, in order to understand participation, research needs to consider beyond individuals or single levels within the organization. It also demonstrates the value in looking across multiple practices and episodes to gain a more holistic view of the entire process over time. This can be visualised as an iterative process model. More can now be done to explore the nature of formulation, exploration and confirmation within a strategizing process. Further work is needed to explore the specific nature of the practices used, and to understand how and why these practices are selected and used. This includes the discursive and sociomaterial aspects of strategy making.

A limitation in this research is the difficulty of being able to conceptualise the findings beyond the specific case. This could be further achieved through the application of social theory, which allows the findings to be applied at a more abstract level. For example, as the dominant theoretical approach to meaning and interpretation in mainstream organizational studies, sensemaking provides a logical underpinning framework (Cornelissen and Schildt, 2015). Kaplan and Orlikowski (2013) identify a need for more work looking at how sensemaking may shift over time, and both the strategic sensemaking and sensegiving literature has drawn out different dimensions of change, developing process models involving information seeking, meaning ascription, and action – showing how these can be used to help managers cope with ambiguity and uncertainty (Rouleau, 2005). The new framework proposed here can be used to enhance the wider understanding about the relationship between strategy participants individual meaning, the collective meaning developed across organizational groups and the episodes through which this meaning is mediated.

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