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Doctoral Thesis

Aligning Future Employee Action and Corporate Strategy in a Resource-scarce Environment

PhD Series, No. 33.2018

Provided in Cooperation with:

Copenhagen Business School (CBS)

Suggested Citation: Kryger, Anders (2018) : Aligning Future Employee Action and Corporate Strategy in a Resource-scarce Environment, PhD Series, No. 33.2018, ISBN 9788793744134, Copenhagen Business School (CBS), Frederiksberg, <https://hdl.handle.net/10398/9667>

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COPENHAGEN BUSINESS SCHOOL
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DK-2000 FREDERIKSBERG
DANMARK

WWW.CBS.DK

ISSN 0906-6934

Print ISBN: 978-87-93744-12-7
Online ISBN: 978-87-93744-13-4

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PhD Series 33-2018

Anders Kryger

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Doctoral School of Business and Management Studies

PhD Series 33.2018

CBS  **COPENHAGEN BUSINESS SCHOOL**
HANDELSHØJSKOLEN

Aligning future employee action and corporate strategy in a resource-scarce environment

Anders Kryger

Supervisor: Maribel Blasco

Doctoral School of Business and Management
Copenhagen Business School

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1st edition 2018
PhD Series 33.2018

Print ISBN: 978-87-93744-12-7
Online ISBN: 978-87-93744-13-4

© Anders Kryger

ISSN 0906-6934

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Acknowledgements

This Industrial PhD project would not have been possible without the support of many people to whom I am thankful: Thomas S. Knudsen, Michael Melzer, Lars Peter Breusch, all from MAN Diesel & Turbo, for supporting my pursuit of the Industrial PhD project, and Tommy Andreasen for providing a constructive working environment. Alex Klinge and Margrethe Mondahl, both from Copenhagen Business School, for supporting me in the application phase. David Boje for being the discussant on my first work in progress seminar in the spring of 2015 and for his support and encouragement in the early phase of the project. Christine Ipsen and Kasper Edwards at the Implementation and Performance Management research group of the Technical University of Denmark for inspiration concerning action research, knowledge management, and ideas on the effectiveness of organizational interventions in the second half of 2016. Dana Minbaeva, Copenhagen Business School, and Svante Schriber, Stockholm University, for highly constructive comments at my second work in progress seminar in late 2017. My company supervisor at MAN Diesel & Turbo Lars Bo Jensen for providing feedback from a business angle. My co-supervisor at Copenhagen Business School Anna Linda Musacchio Adorisio for support concerning storytelling particularly in the early phase of the project. Most importantly, my main supervisor at Copenhagen Business School Maribel Blasco without whom I could not have done this project: in times of frustration (and there were many) Maribel picked me up and provided direct, constructive feedback that guided me forward.

I also want to thank my wife Frederikke and daughters Phillipa and Lily for being a loving base for the three years and three months I spent on the project. The project was initially postponed for seven months due to my oldest daughter Phillipa's illness in 2014. She would later make a full recovery. It is *because of this postponement* that the project materialized as it did. I originally set out study organizational change in a longitudinal perspective. After the postponement, I was asked if I would execute a number of strategy implementation workshops that allowed me to take a deep dive into the wonders of strategy praxis – and this became the focus point of the project. I would not have conducted the workshops that yielded the empirical data I collected for the study, were it not for the seven-month delay. I dedicate this work to Phillipa.

Summary

Can employees' planned future actions and company strategy be aligned in a resource-scarce organization, and if so how? So begins this action research Industrial PhD study that zooms in on the time period that preceded the implementation of a deliberate, top-down strategy at a resource-scarce diesel engine company, and followed its development. The research question takes a point of departure in a seemingly simple task: to align action planning with a strategy. This simplicity is deceptive, however, since in reality such alignment is a highly complex and challenging endeavor for organizations – and more so in an environment of resource scarcity brought on by a market downturn which forces managers to think in short-term deliverables and to deprioritize long-term activities and setting a new strategic direction. Resource scarcity places time and financial constraints on strategy consultants' possibilities to support strategy implementation: managers and their employees have little – if any – time to familiarize themselves with the new strategy, let alone think about how their own actions can support the strategy. To maximize complications, add a layer of pronounced organizational problems that needs to be solved at the same time.

This was the situation at the diesel engine company that takes center stage in this dissertation. Through insider action research, this multiple case study shows that planned actions and a company's strategic reorientation can, in fact, be aligned at a strategy implementation workshop when two conditions are in place. First, efforts should be made to improve workshop design through iterative prototyping, where a prototype design evolves through testing at actual workshops, evaluation with

participants, managers and researchers, and workshop modules are replaced or added until the design proves effective according to all evaluations. Second, interview technique from narrative therapy offers a useful tool to help elicit problems and solutions. The purpose of interviews in narrative therapy is to elicit experience-near accounts of problems and thereby map their influences. This process enables participants to identify the real causes of problems, which is required if effective solutions are to be found. In the final workshop design at the diesel engine company, the new strategy was first introduced at an abstract level and then rendered experience near through facilitation with interview technique from narrative therapy. This enabled participants to interpret past and possible future tasks in the context of the new strategy, and to formulate, select and plan action that was aligned with the strategy, thus supporting the impending strategy implementation.

The strategy implementation workshop can be conceptualized as a strategic episode which – in just three hours – detaches the participants from the organization’s deadline and delivery orientation where there is no time for strategic reflections. This detachment opens up a space for deep reflection where knowledge can be mobilized in a strategic context. The mobilization occurs in a sequence where employees come to the workshop already in possession of knowledge due to prior internalization and socialization at the workplace. In the workshop space, employees’ knowledge about the problems that obstruct the strategy is first externalized and then applied and combined. The newly mobilized knowledge can be internalized, only now with an awareness of its relevance to strategy and future actions, as the workshop ends and the employees return to the usual, rushed temporality of the organization. Knowledge mobilization at a strategy workshop can therefore be used to quickly anchor a strategy in employees’ everyday tasks. Where employees previously perceived

strategy as an abstract phenomenon – or balloons high up in the air and out of reach, as one participant put it – the workshop enabled them to come to a point where they could “pull down the balloons” and work to support the strategy. This makes strategy workshops a promising tool to supplement the conventional task trickle-down process in strategy implementation.

Resumé

Kan medarbejderes planlagte, fremtidige handlinger blive afstemt med og understøtte en virksomhedsstrategi i en ressourceknapp organisation, og i så fald hvordan? Sådan begynder denne action research erhvervs-ph.d.-afhandling, som zoomer ind på perioden efter en top-down strategi var færdigudviklet og inden den blev implementeret i en ressourceknapp dieselmotorvirksomhed. Problemformuleringen tager udgangspunkt i en tilsyneladende simpel opgave: at afstemme handlingsplaner med en strategi. Men skinnet bedrager, for i virkeligheden er sådan en afstemning en kompleks udfordring for organisationer – så meget desto mere i et miljø af ressourceknaphed, forårsaget af en markedstilbagegang, hvilket tvinger ledere til at tænke kortsigtet og nedprioritere langsigtede aktiviteter og det at sætte en strategisk retning. Ressourceknapheden sætter økonomiske og tidsbegrænsninger på strategikonsulenters muligheder for at støtte en strategiimplementering: ledere og deres medarbejdere har kun lidt – om nogen – tid til at blive fortrolig med den nye strategi, for slet ikke at tale om at overveje hvordan deres egne handlinger kan understøtte strategien. Tilføj et lag af udtalte organisatoriske problemer, som skal løses i forbindelse med strategiimplementeringen, for at komplicere situationen yderligere.

Det var situationen for dieselmotorvirksomheden, hvor dette projekt udspiller sig. Gennem insider aktionsforskning viser dette multi-casestudie af strategiworkshops at planlagte, fremtidige handlinger og en virksomhedsstrategi kan afstemmes, og strategien kan guide handlingsplanerne, når to forhold gør sig gældende. For det første skal strategikonsulenten bestræbe sig på at optimere designet af

strategiimplementeringsworkshoppen via iterativ prototypeudvikling, hvor en strategikonsulent udvikler et prototypedesign gennem empiriske tests i reelle workshops med ledere og medarbejdere, hvorefter deltagerne, ledere og forskere evaluerer prototypedesignet, og strategikonsulenten erstatter eller tilføjer workshopmoduler og tester det nye prototypedesign, indtil det fremstår effektivt i alle evalueringer. For det andet er interviewteknik fra narrativ terapi et nyttigt værktøj til at facilitere beskrivelser af problem og løsninger. Formålet med interviews i narrativ terapi er at frembringe erfaringsnære beretninger om problemer, hvorved deres effekter kan kortlægges. Denne proces gør deltagerne i stand til at identificere den reelle årsag til problemer, hvilket er nødvendigt, hvis effektive løsninger, som er målrettet den reelle årsag og ikke blot dens symptomer, skal findes. I det endelige workshopdesign hos dieselmotorvirksomheden introducerede strategikonsulenten først den nye strategi på et abstrakt niveau, hvorefter den blev gjort erfaringsnær gennem narrative interviews. Dette muliggjorde at deltagerne fortolkede fortidige og fremtidige opgaver i konteksten af den nye strategi, og at de formulerede, udvalgte og planlagde handlinger, som var afstemt med og understøttede strategien og herigennem støttede den forestående strategiimplementering.

Strategiimplementeringsworkshoppen kan konceptualiseres som en strategisk episode, som – på kun tre timer – kan koble deltagerne fra organisationens deadline- og leveringsorientering, som ikke efterlader tid til strategisk refleksion. Frakoblingen åbner et rum for dyb refleksion, hvor deltagerne kan mobilisere viden i en strategikontekst. Mobiliseringen foregår i en sekvens, hvor medarbejderne, når de til kommer til workshoppen, allerede besidder viden gennem internalisering og socialisering på arbejdspladsen. I workshoprummet kan strategikonsulenten først eksternalisere deltagernes viden om problemer, som forhindrer

strategiimplementeringen, og derefter kan den nymobiliserede viden bruges og kombineres i en strategikontekst. Deltagerne kan internalisere den nymobiliserede viden ved udgangen af workshoppen, men nu med en bevidsthed om dens relevans for strategi og deres fremtidige handlinger, når de vender tilbage til den sædvanlige, forhastede hverdag i organisationen. En strategikonsulent kan derfor bruge mobilisering af viden i en strategiworkshop til hurtigt at forankre strategi i medarbejdernes hverdagsopgaver. Hvor medarbejderne tidligere forstod strategi som et abstrakt fænomen – eller balloner højt oppe i luften, uden for rækkevidde, som en workshopdeltager udtrykte det – har workshoppen bragt dem til et punkt, hvor de kan ”trække ballonerne ned” og arbejde for at understøtte strategien. Dette gør strategiworkshops til et lovende værktøj til at supplere den konventionelle nedsivningskaskade af opgaver i forbindelse med strategiimplementering.

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1. Introduction

This dissertation and the papers that are included were made possible by the Danish Industrial PhD Program (“Industrial PhD,” 2017). It is a three-year program where an Industrial PhD student is employed in a private sector company and enrolled at a university. Innovation Fund Denmark subsidizes a part of the student’s salary during the project period. The PhD student is the project manager of a research project in collaboration with the company and the university. This setup allows for the results of the research to be applied in the company setting. An Industrial PhD project benefits all three parties: the company gets high quality research that aims at generating commercial benefits, the university strengthens its relations to the business sector, and the Industrial PhD student gets a research degree that allows him/her to operate in the cross section of business and university and thus opens new avenues of career development.

I was employed at MAN Diesel & Turbo in November 2007, and started as project coordinator focusing on communication in connection with a large IT transformation project. I then switched to a position as internal communications manager in January 2009. As a non-engineer – my Master’s degree was in English and business communication – I realized that I needed to learn to ask particular types of questions to the engineers when I interviewed them for various communication purposes. I searched for a course in interview technique and incidentally came across a course in narrative coaching at the Danish course center DISPUK. Little did I know when I started the course in 2009 that it would open up a new and exciting world for me. Although the course title referred to coaching, I intended from the beginning to

interpret what I learnt at the course in a communications context. To my satisfaction, I was indeed able to use the narrative interview technique for many communications purposes, not only in interview settings, but to structure articles, PowerPoint presentations, information meetings and workshops.

In 2012 came a turning point in my career when I facilitated a workshop with the purpose of defining a strategy for a newly established purchasing department. Of course, I did not know at the time where it was just another task. I used narrative interview technique to facilitate the co-authoring of the department's values, mission statement and vision and the participants and I were surprised at how easily they were able to put into words their values, mission and vision. After the workshop, I was excited. I decided to try to understand what had happened at the workshop – what was it that had worked so well? My desire to understand the processes of the workshop made a difference to my professional interests: they shifted from communication to strategy. I realized that I was much more interested in facilitating, executing, driving and managing strategy processes than communicating about strategy. I started looking into ways of analyzing the workshop and found my way to the Industrial PhD program. After a couple of years of debating with myself whether I wanted to go back to school and negotiating with managers at different levels at MAN Diesel & Turbo and Copenhagen Business School as the collaborating university, I made the decision to pursue an Industrial PhD project. When starting the Industrial PhD project, I left my relatively new position as department manager of a small international team responsible for communication strategy in the MAN Diesel & Turbo group and switched to a position as Senior Business Strategist in the two-stroke engines division in Copenhagen. It was in this position as an insider action

researcher (Coghlan & Shani, 2008; Roth, Sandberg, & Svensson, 2011) that I undertook the research project.

1.1 Research question

One of my driving forces was to generate research that could be used for something in a business context. When I was trying to understand what had happened at the strategy workshop in 2012, I was not able to find research that shed light on the processes of that type of workshop. When I started the project, I made it my mission to draw attention to the praxis of strategizing and facilitation in an organizational context so that my research would benefit curious practitioners and kindred spirits. I wanted to channel this mission into a research question that lived up to the requirements of the Industrial PhD program that emphasized that research should benefit business as well as the academy (“Industrial PhD,” 2017). Naturally, the current challenges of the two-stroke division set the context of my research which I will briefly outline before coming to the research question.

	2015	2016
Revenue	€3.3 billion	€3.1 billion
Operating profit/loss	€216 million	€29 million
Return on Sales margin	6.5 %	-0.9 %
Employees	14,935	14,603

Table 1.1. MAN Diesel & Turbo key figures 2015-2016

MAN Diesel & Turbo is a provider of large-bore diesel engines and turbomachinery for marine and stationary applications (“MAN Diesel & Turbo Company Profile,” 2017) and is owned by the holding company MAN Group which is owned by the Volkswagen Group. MAN Diesel & Turbo generated revenue of 3.1 billion Euro in 2016 (3.3 billion Euro in 2015), an operating loss of -29 million Euro in 2016 (216 million Euro profit in 2015), and a return on sales margin of -0.9% in 2016 (6.5% in

2015) with a workforce of 14,603 employees in 2016 (14,935 in 2015) (“MAN Annual Report 2016,” p. 7 see Table 1.1). The decline in revenue, earnings and particularly in return on sales margin shows that the company was going through a critical time and analyses showed that the downturn was due to a deterioration of the markets for oil-related products. A number of market factors had driven over-contracting in the shipbuilding market in the prior years which resulted in a larger supply than demand, and thus the contracting activity fell.

The same picture was found in the two-stroke division in Copenhagen that is the focus of attention in this Industrial PhD project, with its approximately 700 employees (in August 2017) and an additional approximately 700 employees in surrounding, supporting functions such as after sales (which organizationally belongs to another division), production (yet another division), and group functions (also not belonging directly to the two-stroke division). The two-stroke division had recorded historically low contracting of two-stroke engines. This type of marine diesel engine is the largest in the world and is sold for the world fleet’s largest ships such as container carriers, bulk carriers and tankers of more than 2,000 deadweight tons. The low level of two-stroke engine contracting forced the division to act in a number of ways to reduce costs and thus accommodate the lower earnings that were expected to continue in the coming years.

The cost reduction in the two-stroke division was accompanied by a renewed focus on strategy and the implementation of a range of activities defined in a strategy. The top managers of the two-stroke division planned for the strategy to be communicated to the employees of the division. In 2016, the results of an employee engagement survey indicated, however, that the employees perceived a number of problems, particularly concerning roles and processes that the top managers decided needed to

be resolved in connection with the strategy implementation. While I did not lose sight of the workshop in 2012 that sparked my interest in pursuing an Industrial PhD project, the required problem solving coupled with strategy implementation in the two-stroke division became the main priority of the project.

The issues that I decided to include in the project relate to the workshop situation and the micro processes that can be brought into play. The issues that I decided to exclude from the project concern the longitudinal, actual implementation of the fan of activities that were part of the strategy. My reason for limiting this study to the workshop situation can be traced back to my time as the curious practitioner who searched in vain for research that would enlighten my practice: I was able to find plenty of research that theorized organizational change, but little empirical work that touched on these very important issues that strategy consultants need to deal with:

1. how a strategy formulation can be facilitated; and in continuation
2. how a facilitation technique's effectiveness can be determined;
3. how a workshop design can be developed in resource-constrained environments; and from an analytical angle
4. how micro activities at strategy workshops can be analyzed

The first issue can be directly linked to my interest in the workshop in 2012 and thus deals with the processes that facilitate strategy *formulation* – the latter three issues deal with strategy *implementation* and represent the data collection I undertook during this Industrial PhD project. The second issue deals with a strategy consultant's fundamental methodological experiences: what technique works best in particular situations? The third issue addresses how a strategy consultant can develop a rigorous workshop design that is versatile yet can help achieve specific targets. The fourth issue is more analytically oriented and deals with what a strategy consultant can pay

particular attention to in order to understand what actually happened at a workshop. These four issues became drivers in my research and each issue was analyzed in a research paper – all four papers are included in this dissertation. These four issues, or sub-research questions, needed a bridge that captures what I was really trying to study. And so the overarching research question for this Industrial PhD project is:

Can employees' future actions and company strategy be aligned in a resource-scarce organization, and if so how?

This research question formulation addresses a key event in a strategy consultant's activities: the point in time where a strategy formulation meets the employees and they – ideally – express their intention to undertake particular actions that support the strategy, and then they later actually do it. The clear limitation of this project is that attention is exclusively on the workshop situation and nothing beyond the workshop situation. It would have been highly interesting and relevant to follow the actual implementation of the actions that the workshop participants address. But by giving full attention to the workshop situation I seek to enhance our understanding of the micro mechanisms and inter-dynamics that are in play in a complex organizational situation as a workshop. I aspire that my research will enlighten curious practitioners in terms of understanding what goes on in strategy workshops and how workshops can be analyzed. Finally, I hope that the strategy processes that I developed and documented during this Industrial PhD project will benefit not only MAN Diesel & Turbo's two-stroke division, but also other companies and strategy consultants in general.

1.2 Outline of the dissertation

The dissertation is structured as follows: chapter 2 introduces and defines the concepts of strategy, strategy implementation and a major problem associated with strategy, namely how knowledge can be mobilized in a strategy implementation context so that employees understand the strategy and their actions and organizational change are aligned with it. Chapter 3 describes how data was collected at the strategy formulation workshop in 2012, the strategy implementation workshops in 2016 as well as a review of the findings by external strategy consultants and two sorting and naming exercises conducted subsequently with employees at the two-stroke division. Chapter 4 provides four empirical papers in various stages of review and publication. Chapter 5 is a discussion of the applicability and implications of the theoretical model I propose in Chapter 2 in light of the findings of the empirical papers. Chapter 6 is the conclusion where the answer to the research question is given and the dissertation ends with a discussion of the perspectives of this study.

2. Theory

This chapter first addresses the differences between two predominant approaches to strategy: deliberate strategy and emergent strategy. Second, the elements that enable or impede strategy implementation will be described from a theoretical perspective and linked to the empirical challenge at the diesel engine company. Third, I will present a theoretical model of knowledge mobilization that describes how a strategy workshop with narrative facilitation can establish previously missing or lacking relations between strategy and some of the critical elements in strategy implementation in an efficient manner and is thus well-suited for a resource-scarce organization. Interview technique from narrative therapy will be introduced as a valuable and novel approach to facilitating strategy implementation workshops with the objective of anchoring strategy, which is often formulated in abstract terms, in employees' everyday activities. The process of iterative prototyping will be introduced as a valuable and novel approach to strategy workshop design in a resource-scarce organization facing problems in connection with strategy implementation. Finally, I will link my theoretical model to the two main approaches to strategy by showing how elements from the emergent strategy approach can be introduced in the deliberate strategy approach to improve strategy implementation.

2.1 Strategy

Strategy is top management's long term planning of resources to "attain outcomes that are consistent with the organization's missions and goals" (Mintzberg, Ahlstrand, & Lampel, 2005, p. 9). Strategic management of an organization thus requires navigation from the current to the future. The mission statement has been described

as “the sex drive of organizations” (Bart, 1997, p. 9) because it provides employees with a sense of purpose, describes how the organization intends to satisfy customers, and the organization’s values and distinctive competence (p. 15). The organization’s desired future is described in a set of objectives cumulatively referred to as vision (G. Hamel & Prahalad, 1993). Where a mission statement delineates the company’s playing field, a vision marks the goal and provides the direction of play, and a strategy provides the plays that will drive the organization toward the goal. Three basic processes characterize strategic management: planning, implementation, and control (Ansoff & McDonnell, 1990, p. 308). Whether the strategy formulation is finalized before implementation starts or whether formulation and implementation occur incrementally differentiates the two prevalent approaches to strategizing, as displayed in Table 2.1.

In the deliberate or prescriptive approach, strategy formulation is a decidedly top management activity where the CEO or the top management team act(s) as planning architect(s) (Bourgeois & Brodwin, 1984, p. 249) of a blueprint strategy (Mintzberg et al., 2005, p. 57) that is first formulated, then implemented in the organization, where after compliance to the strategy is monitored. Markets with a long production cycle, such as shipbuilding where it takes around two years to build a ship, enable long term strategizing where the guiding question can be “where do we want to be in 10 years?” and once the objective is set, the strategy is a matter of thinking backward and planning which milestones precede the objective. Thus a stable market lends itself to top-down strategizing where the planning team’s decision making is supported by frameworks such as analyzing the contending forces (Porter’s five forces) that determine the profitability of an industry or a company: threat of new entrants, bargaining power of customers, threat of substitute products or services,

bargaining power of suppliers, and jockeying for position among current competitors (Porter, 1979); portfolio planning for example by using the Boston Consulting Group growth/share matrix which divides products or companies in stars to be invested in, cows to be milked, dogs to be divested, and question marks to be analyzed (Madsen, 2017); or using the McKinsey 7S framework to plan the organizational change process within each of the ‘S’ dimensions: superordinate goals, strategy, structure, systems, style, staff, and skills (Waterman Jr, Peters, & Phillips, 1980).

In the emergent or descriptive approach, strategy formulation is a collective organizational endeavor although the process control rests with top management (Bourgeois & Brodwin, 1984, p. 260) and the strategy emerges (Mintzberg & Waters, 1985) in incremental steps (Mintzberg et al., 2005, p. 170). Markets with a short production cycle, such as digital products, impose restrictions on a company’s planning horizon which means that the guiding question cannot be “where do we want to be in 10 years?” but rather “where *can* we go in 2-5 years?”. Thus the point of departure is the present rather than the future. A fast-moving market lends itself to a strategy process that involves frontline employees and middle managers to incorporate current market intelligence in the strategy process. Therefore, there is no clear cut between strategy formulation and implementation: the emergent strategy is already being implemented as it finds its final formulation due to the collective involvement of the organization. The planning team that steers an emergent strategy process can be supported by frameworks that gauge and plan current and immediate-future resources and capabilities (cf. the resource-based view of the firm, Barney, Wright, & Ketchen, 2001), and how the resources can be effectually utilized to make products and opportunities (cf. effectuation, Sarasvathy, Kumar, York, & Bhagavatula, 2014).


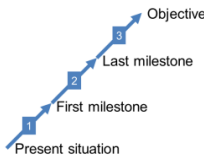
	Formulation precedes implementation	Formulation occurs incrementally with implementation
Strategic choice	Deliberate / prescriptive	Emergent / descriptive
Planning style	Blueprint	Emergence of vision through process of understanding
Organizational anchoring	Top-down	Collective
Temporal orientation	<p><i>Where do we want to be in 10 years?</i> – first determine the objective, then think backward and plan milestones that will lead to the objective</p> 	<p><i>Where can we be in 2-5 years?</i> – first think forward and plan milestones based on the currently available resources, then determine the objective</p> 
Market environment	Stable	Turbulent
Planning horizon	Long	Short
Typifying frameworks (illustrative examples, not exhaustive list)	<ul style="list-style-type: none"> • Industry analysis e.g. Porter's Five Forces • BCG growth/share matrix • McKinsey 7S model 	<ul style="list-style-type: none"> • Resource Based View • Effectual reasoning

Table 2.1. Comparison of the central characteristics of deliberate and emergent strategy approaches

Proponents of various schools of thought within the prescriptive and descriptive approaches to strategy have debated hotly in attempts to delineate the circumstances under which one particular approach is superior to another. The prescriptive approach to strategy has been particularly criticized for separating formulation and implementation and thus assuming that the environment is stable enough for the strategy to remain viable after implementation, and for the power vested in the person of the CEO (Mintzberg, 1990, 1991). The emergent approach to strategy, on the other hand, has been criticized for using a trial and experience process that is simply an extension of a company's historical patterns, thus denying the company strategic renewal and for being more relevant for non-profit organizations and less so for profit organizations (Ansoff, 1991). These inherent differences in deliberate and emergent approaches to strategy pose a wicked problem (Liedtka, 2015, p. 926) to a strategy consultant who might perceive the two approaches to strategizing as mutually exclusive. Liedtka compares a strategy to a building, stating that "once constructed, [it] cannot be easily changed, and so learning through experimentation in practice is undesirable. This is the ultimate source of 'wickedness' in such problems: their indeterminacy places a premium on experimentation, while the high cost of change makes such experimentation problematic" (Liedtka, 2000, p. 13). This architectural reconceptualization of approach to strategy opens up for the possibility to fit the hallmark incrementalism of emergent strategy into deliberate strategy formulation. In doing so, it addresses an empirical challenge to any deliberate strategy: how to anticipate the problems related with the implementation of a strategy when it has been conceived by top management as grand architects.

The long-term nature of the shipbuilding industry, where the construction of a vessel typically takes two years from keel laying to sea trial, allowed the diesel engine

company in question to take a deliberate, top-down approach to strategy formulation. Although the market for shipbuilding practically vaporized in 2016 where this study was made, which saw the lowest level of ship contracting in three decades, the diesel engine company relied on the historical market development and was confident that the market would pick up again, and therefore a long-term planning horizon was maintained by top management. The challenge for the diesel engine company was how to deal with the barriers to change that were identified in an employee survey while implementing and anchoring the top-down strategy in the employees' daily work (Heracleous, 2000, p. 83). The next section describes problems that empirically result from the separation of formulation and implementation that is built into the deliberate strategy approach which is "much more problematic to implement" than an emergent strategy approach with its contribution by employees at all hierarchical levels (Heracleous, 2000, p. 82). Although more problematic to implement, the long-term deliberate approach to strategy has been found to deliver a higher return on investment than the short-term emergent approach to strategy (Heracleous, 2000, p. 79).

The next section expands and explores the problems of implementing a deliberate strategy which was the selected strategy approach at the diesel engine company.

2.2 Strategy implementation and its associated problems

For two decades now, scholars have observed that the overwhelming majority of research in the field of strategy has been on formulation as opposed to implementation (Al-Ghamdi, 1998; Alexander, 1985; Gioia & Chittipeddi, 1991; Aaltonen & Ikävalko, 2002), suggesting that implementation is less glamorous than formulation and overlooked because it is perceived as simple (Aaltonen & Ikävalko, 2002, p. 415). Strategy implementation has been defined as managing organizational

change by turning long-term planning into tasks and ensuring that the tasks are executed and strategic objectives are reached (Heracleous, 2000; Noble, 1999). Therefore, strategy implementation has also been labeled 'execution' and 'actualization of goals' (Li, Guohui, & Eppler, 2008, p. 4) thus emphasizing that change is key in strategy implementation. The most common types of changes that need implementation have been summarized as introducing new products or services, opening a new facility, entering a new market, discontinuing or withdrawing from a market, mergers and acquisitions, and strategic reorientation (Al-Ghamdi, 1998, p. 324). The change at the diesel engine company was a strategic reorientation. In this section, I will first introduce the dimensions that need attention and alignment to achieve successful strategy implementation along with the most common problems related to each dimension. Finally, I link the dimensions of organizational change in connection with strategy implementation to the empirical challenge for the diesel engine company.

Table 2.2 shows the dimensions of strategy implementation. The dimensions are interconnected and if changes are made in one dimension, the other dimensions need realignment to ensure a successful implementation (Galbraith, 2014). The dimensions included in the table are sometimes referred to as 'the McKinsey 7S model' where the seven S's refer to strategy, structure, systems, style, staff, skills, and shared values (Higgins, 2005). Similar dimensions were described by Beer & Eisenstat (2000) albeit with different labels: structure, systems, leadership behavior, human resource policies, culture, values and management processes. Higgins (2005) suggests to add an eighth S, reSources, where top management ensures adequate resources in the form of people, technology and money to realize the objectives. This dimension was partly although not explicitly a meta dimension in the 7S model

where resources was an element in the other dimensions, but not a dimension in its own right. However, as Galbraith points out (2009, 2014) not all of the S's are directly actionable: "managers can influence performance and culture, but only by acting through the design policies that affect behavior" (Galbraith, 2009, p. 5). Therefore, he restructured the seven S's into his 'Star Model' which consists of Strategy, Structure, Processes, Rewards, and People, all of which are actionable to top management who can formulate policies for each area to ensure alignment and effective implementation. The dimension 'systems' in the 7S model corresponds with 'processes' in the Star Model. 'Staff' corresponds with 'people'. 'Style' denotes the leadership/management style which is part of 'processes' and describes processes of management, decision making, and information. Realignment within each of the dimensions means that top management must confront hard trade-offs directly rather than adapting them along the way in the strategy implementation (Beer & Eisenstat, 2000, p. 33) in order to achieve commitment and motivation from the employees (Radomska, 2014, p. 265).

Table 2.2 also lists some of the problems that have formerly been identified in connection with strategy implementation. The first problem relates to the strategy dimension and describes the core challenge to companies that run a deliberate top steered strategy process: too little involvement of middle managers and frontline workers in the strategy formulation and implementation planning can generate demotivation and unwillingness to implement the strategy (Heracleous, 2000). This problem is diminished in an emergent strategy process where information and involvement of the lower organizational levels is imperative for the strategy formulation. Not realigning the organizational structure to achieve the objectives is another reported problem that can hinder strategy implementation (Heracleous,

2000). If, for example, the strategy necessitates cross-organizational knowledge sharing, it may fail if the organization structure is based on highly specialized functional teams who tend to work in silos. Several problems relate to processes: trickle-down planning of key performance indicators (KPIs) at all organizational levels requires direction and leadership of the department managers, and the process can be stopped if a manager does not engage in the planning process. A related problem is that KPIs are planned at a too superficial level without the necessary level of detail that makes them actionable (Alexander, 1985). Another problem is if the strategy is perceived as too abstract so that the managers cannot easily plan actions that will lead to the realization of the strategic objectives (Heracleous, 2000; Hrebiniak, 2005). This was one of the problems facing the diesel engine company. Concerning the dimension of rewards, failing to create an incentive system that motivates performance that supports the strategy can hinder strategy implementation (Heracleous, 2000). Problems in connection with human resource policy realignment include not accounting for the qualifications of the future workforce and developing the current workforce or hiring new employees with the necessary qualifications to reach the objectives (Alexander, 1985; Heracleous, 2000).

The two dimensions, strategic performance and culture, cannot be directly managed, but influenced by managing the five other dimensions. If the five dimensions strategy, structure, processes, rewards and human resource policies are aligned to reach the strategic objectives, strategic performance ensues (Galbraith, 2014). It can, however, be a problem in the dimension of strategic performance if performance is not monitored, or controlled (Ansoff & McDonnell, 1990), adequately to enable intervention if the implementation falls off track (Alexander, 1985). The last problem

Dimensions	Associated problems
Five dimensions can be managed	
Strategy: choosing objectives cross-organizationally, making trade-offs, long-term planning of resources such as people, technology and money to reach objectives	<ul style="list-style-type: none"> • Lack of participation and influence by middle managers and frontline workers in strategy formulation and planning of implementation
Structure: placement of power and authority, materialized in an organizational chart	<ul style="list-style-type: none"> • Not developing organizational structures that support the strategy and ensuring information sharing and clear accountability
Processes: developing management policy and behavior, decision making, information flow	<ul style="list-style-type: none"> • Lack of leadership and direction by department managers in the trickle-down process • Lack of clear guidelines for action • Milestone planning is not defined in actionable tasks in enough detail
Rewards: alignment of employees' goals with objectives, adaption of policies regulating salaries, promotions, and bonuses to create commitment and motivation	<ul style="list-style-type: none"> • Lack of systems for selection, motivation and reward of people
Human resource policies: recruiting, selecting, rotating, training, developing employees, defining number and types of employees needed to reach objectives	<ul style="list-style-type: none"> • Lack of training and development of required skills and capabilities of employees
Two dimensions can be influenced by alignment of the above dimensions	
Strategic performance: objective achievement	<ul style="list-style-type: none"> • Lack of monitoring and feedback mechanisms concerning quality, finance, etc.
Culture or shared values	<ul style="list-style-type: none"> • Lack of identification of cultural aspects and shared values that can be major problems and barriers to change

Table 2.2. Dimensions that need change management and realignment in connection with strategy implementation, and problems that are associated with each dimension; my synthesis and clustering of dimensions and problems (Alexander, 1985; Beer & Eisenstat, 2000; Galbraith, 2009, 2014; Heracleous, 2000; Higgins, 2005; Hrebiniak, 2005, 2006; Noble, 1999)

concerns organizational culture where it can be a challenge to top management to identify aspects that can be “barriers and facilitators to change” (Heracleous, 2000, p. 81). Only by identifying, explicating, and managing the barriers to change embedded in the culture can the strategy implementation run as intended. This process of identification and explication is centered around tacit knowledge where tacit refers to “the fact that *we know more than we can tell*” (Polanyi, 1966, p. 4): in connection with strategy implementation, mobilization of tacit knowledge can help organizations overcome the barriers to change that may exist between employees and top management as grand architects (Dayan, Heisig, & Matos, 2017, p. 312).

The problem of managing the barriers to change embedded in the culture was particularly salient and relevant for the impending strategy implementation at the diesel engine company where a recent employee survey exposed what watercooler talk had long suggested, that employees expressed dissatisfaction in some of the dimensions cited above. Therefore, top management intended to identify, understand and manage the problems.

In a historical perspective, organizational changes at the diesel company had been market driven in the booming years from the 1990s to the early 2010s: changes were not driven by a strategy, but by a necessity to, for example, build an organization around emission control when the International Maritime Organization introduced their emission regulation protocols. Therefore, changes can be said to have occurred in the dimensions of organizational structure, processes, and HR policies – and only to a minor extent reward systems because they were decided by the holding companies, the MAN Group and later the Volkswagen Group. The challenge that the diesel engine company was tackling at the point in time when this study started was how to anchor organizational change in the strategy dimension as opposed to market

forces that had been the driver of organizational change for two decades. The relations between strategy and the four other dimensions were vague if not non-existent and therefore needed to be established (see Table 2.3) – this was the empirical challenge for the diesel engine company. In practical terms, this meant that employees needed to have the strategy presented, digest it and relate it to their respective everyday tasks while identifying the cultural barriers that could hinder the organizational changes that were necessary to implement the strategy.

Table 2.3 shows the initial situation at the diesel engine company where organizational changes in the dimensions structure, processes, reward systems, and HR policies were driven not by strategy, but by other factors which are not shown in the model: the interesting aspect of organizational changes in the initial situation is not what factors caused them (many factors can have), but that they are unrelated to strategy, hence the missing relations from strategy to the four other dimensions. Any company in this situation may struggle, like the diesel engine company, to establish – and for some companies reestablish – relationships between these elements. The (re-)established links from strategy to the other dimensions are shown in the desired situation in Table 2.3: here, organizational changes occur in alignment with a strategy.

This action research case study was set up as a reaction to this empirical challenge with the purpose of developing an efficient and effective method for mobilizing employees' tacit knowledge about problems that restricted strategy implementation and to align actions in the problem-solving process with the new strategy. The key aspect from a research perspective, then, was mobilization of knowledge and alignment of action planning with the strategic objectives. The next section is a literature review of knowledge mobilization studies in a strategy context.

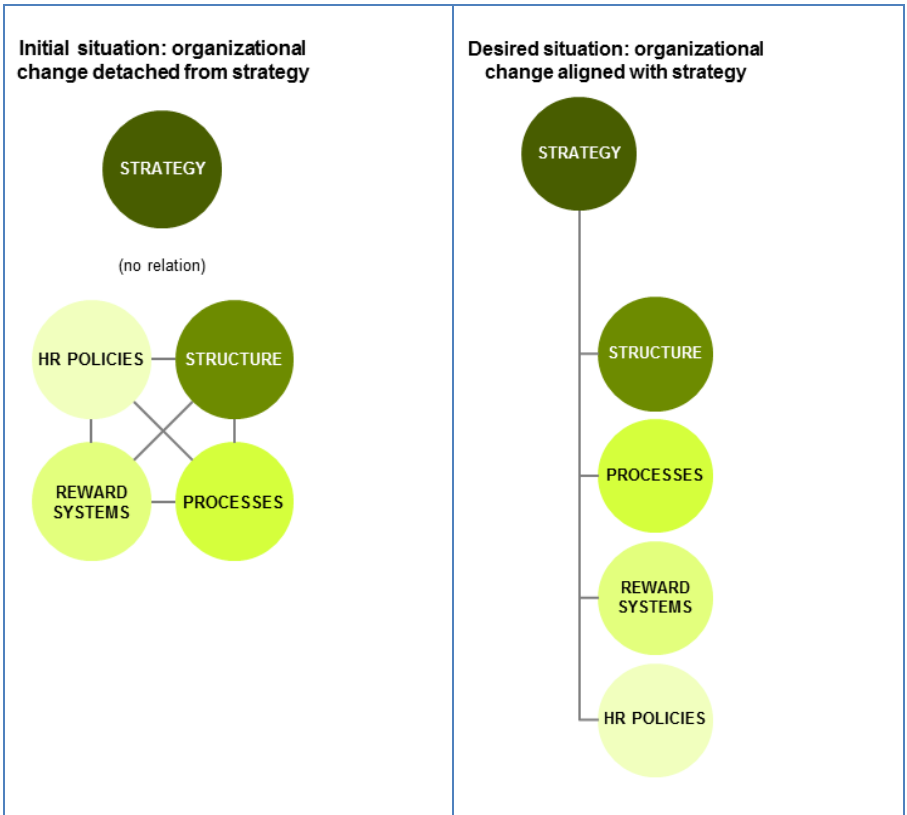


Table 2.3. Initial situation where organizational change is detached from the strategy dimension and desired situation where organizational change occurs in alignment with strategy (left side: modified star model (Galbraith, 2014); right side: own design)

2.3 Knowledge mobilization in a strategy perspective

In this section, I will define knowledge and then present a focused literature review of studies that have previously focused on mobilizing knowledge in a strategy context.

Knowledge has been said to emerge from dialogue as a process in which people can be exposed to multiple perspectives and perceptions of the same event (Nonaka, Toyama, & Hirata, 2008, p. 12). In a slightly different definition that emphasizes that knowledge does not emerge from just sharing perspectives and perceptions, but from interpreting perspectives and perceptions and justifying that interpretation through dialogue, Hislop states that knowledge “results from the process via which people (attempt to) justify their personal beliefs” (2013, p. 107). Mobilization of employees’ and managers’ knowledge has been described in research on knowledge management (e.g. Nonaka & Takeuchi, 1995; von Krogh, Nonaka, & Rechsteiner, 2012) that theorizes the knowledge creation process as iterations between socialization (S), where individuals share knowledge, ideas and practices via collaboration; externalization (E), where a group of employees can articulate experiences; combination (C), where knowledge can be combined and systematized at the organizational level; and internalization (I), where employees individually refine and familiarize themselves with new knowledge (Nonaka & Toyama, 2003, pp. 4–6). Iterations of the SECI sequence are referred to as the knowledge spiral. In this sequence, people can be exposed to multiple perspectives in the externalization phase where people articulate experiences, and conflict may arise between competing perspectives. The organizational context or actual physical space where knowledge creation processes, such as externalization, can occur is called *ba* (Nonaka &

Toyama, 2003, pp. 6–9), and an example is an organizational knowledge development workshop (Nonaka, Von Krogh, & Voelpel, 2006, p. 1184).

ba is [...] defined as a shared context in which knowledge is shared, created and utilized. In knowledge creation, generation and regeneration of *ba* is the key, as *ba* provides the energy, quality and place to perform the individual conversions and to move along the knowledge spiral. (Nonaka, Toyama, & Konno, 2000, p. 14)

Table 2.4 displays the four types of *ba*: originating *ba* that can emerge and three *ba*'s¹ that can all be consciously created: dialoguing *ba*, systemizing *ba*, and exercising *ba*. Important in a strategy context is that the performance of a *ba* as a platform for conversion from tacit to explicit knowledge in the SECI sequence can be moderated by knowledge assets (Nonaka et al., 2000, p. 8, 20f). Knowledge assets can for example be persons that further the SECI sequence in a *ba*, documentation that enable conversion of tacit knowledge to explicit knowledge, and prioritization and decision making models.

Previous studies on knowledge creation in a *ba* as a source of competitive advantage focused on identifying *ba*'s in various contexts, particularly in connection with intra- or extra-organizational networks (Balestrin, Vargas, & Fayard, 2008; Brännback, 2003; Brännback, Carsrud, & Schulte, 2008; Rice & Rice, 2005), as well as in connection with IT system implementation (Nomura, 2002) and with how organizational requirements for the ISO9001 certification in quality management can be viewed as a *ba* (Lin & Wu, 2005). All studies emphasized from their various

¹ The literature is inconsistent with the plural form of *ba* where no plural, bas, and ba's can be observed. I will use *ba* in the singular form and *ba's* in the plural.

Originating Ba	Dialoguing Ba	Systemizing Ba	Exercising Ba
A place that emerges where people share tacit knowledge in the form of experiences and their perceptions of the experiences thus transcending the boundary between self and others.	A consciously constructed place for externalization, i.e. further sharing and articulating experiences and ideas followed by naming of them and formulating them as concepts through dialogue among the participants.	A context for systematization and combination of newly externalized knowledge, e.g. in the form of documentation so that it can be disseminated and applied.	A context for internalization where persons can interpret and begin to synthesize and apply explicit knowledge.

Table 2.4. Four types of ba (Nonaka et al., 2000, pp. 16–17)

perspectives that a successful ba is associated with the formulation of a set of objectives that capture senior management’s plan for utilizing the knowledge that is generated in a ba. The objectives must be clarified to the participants (Brännback, 2003, p. 32; Choo & Neto, 2010, p. 603). Similarly, a ba should not be created simply to explicate tacit knowledge for the sake of explication. Such efforts have failed because simply “making knowledge visible” is not a motivating factor for employees to engage in a ba (Nomura, 2002, p. 269). Additionally, it has been found that a ba should emulate participants’ workstyle, as well as bring managers and employees together (Nomura, 2002, pp. 265–266).

In the following paragraphs, I will review the above-cited studies of how organizations can or have gone about creating a ba in a strategy or business development context.

In a case study of the Clothing Industries Association of Rio Grande do Sul, a network of 35 small firms in southern Brazil, Balestrin et al. (2008) identified several

ba's where knowledge was shared and could be mobilized. Originating ba's emerged (i) when representatives from the various companies in the small firm network visited each other and converted tacit knowledge concerning production processes to explicit knowledge which led to business gains, (ii) when market knowledge was provided to the network companies through trips, visits and fairs, and (iii) when lunches and dinners established and strengthened trust among the network members. A dialoguing ba was created through a monthly assembly which is a forum for formal knowledge sharing, but also through small informal meetings among some of the businessmen before and after the assembly that favored more specific discussions concerning production, suppliers, and raw materials. A dialoguing ba was also created when all members participated in strategic planning of joint network objectives and action planning, and the subsequent implementation created commitment among the group members. A systematizing ba was created when the state government provided courses and lectures to representatives of the network companies where they learned about and discussed production standards and processes. An exercising ba occurred when the acquired knowledge was put to action when the network members applied the new organizational practices and reengineering production processes, leading to good results.

By reviewing literature on research and development networks, Brännback (2003) first identifies several ba's in biopharmaceutical knowledge networks, i.e. between research-based pharmaceutical companies and (i) academic research centers at universities, (ii) service providers such as contract research organizations, (iii) information technology companies, (iv) other pharmaceutical companies, (v) venture capital, and (vi) biotech companies. Each of the enumerated entities forms a ba and can also form a networked ba. She then turns to a study made by the National

Technology Agency in Finland on the possibility of making a pre-clinical service network: the conclusion was that the network was not feasible due to absence of a ba and knowledge about how to make a ba. Lastly, conflicts concerning the requirements in the academic ba and the commercial ba, respectively, impeded the operation of the research center at a university in Finland which did not meet its objective to function as a contract research organization on a commercial basis in its first year of existence.

In a study of the importance of ba's in a family business context, Brännback et al (2008) emphasize the importance of continuity of a knowledge-creating ba for family companies. The knowledge creation process, they assert, is fairly straightforward because of the relatively few people involved in the knowledge management work (p. 112). The knowledge conversion process in the ba is constructed through knowledge assets such as leadership choice and fairness versus equity. They posit that "family firms with an effective ba" have more "successful succession or survival strategies [than] those firms that do not have a *Ba*" (Brännback et al., 2008, p. 113).

In a paper on knowledge management in an IT context, Nomura (2002) simply states that a ba for sharing problems and collaborating may be possible by "providing a virtual Q&A space or a physical large room" (p. 271).

In a paper on applying the SECI sequence in connection with multi-organizational projects, Rice & Rice (2005) find that knowledge exchange across organizations can be facilitated in ba's: an originating ba where face-to-face meetings can elicit tacit knowledge on potential barriers to collaboration, a dialoguing ba where elicited tacit knowledge can be summarized in a jointly developed system, a systematizing ba that can help solidify the respective organizations' commitments to develop multi-organizational routines which are considered a knowledge asset, and, lastly, an

exercising ba where shared organizational knowledge can be transferred and applied across organizations to achieve the respective organizations' commitment to the shared aims.

In a paper on the ISO9001:2000 quality standard and management system, Lin & Wu (2005) identify six possibilities for knowledge creation – their order corresponds to the quality management system processes: (i) managers' joint responsibility to show intent and commitment to implement ISO9000 can be created at a systemizing ba where the managers can interact, systemize and combine externalized knowledge from audits, reports, and analyses. (ii) managing resources involves tangible resources such as infrastructure and intangible resources such as the qualifications of the employees. Employees applying explicit and documented knowledge can be an exercising ba. (iii) a market orientation through communication with customers can be obtained through an originating ba where customers' tacit knowledge can be accumulated. (iv) planning and developing the processes needed for product realization can be done through a number of ba's, e.g. a dialoguing ba for reviewing contracts, evaluation of suppliers, and design planning; a systemizing ba for reviewing, verifying, and validating design or purchasing documents; and an exercising ba for measuring and calibration through use of standards. (v) analysis and exploitation of data from monitoring to optimize processes can be achieved by applying explicit documented knowledge in an exercising ba which can be supported by corrective and preventive action planning in a systemizing ba. Finally, (vi) understanding of customer perception through long-term relationships can be achieved in a dialoguing ba where customer perception of the company's products is made explicit.

Summarizing the studies of ba in a strategy context, there are four conditions that enable a ba (Choo & Neto, 2010): social or behavioral conditions that foster mutual trust of the ba participants, a cognitive requirement for knowledge that is diverse yet based on shared beliefs and mental models, a system requirement where the elicited knowledge can be documented and used, and a strategic requirement for the manager of the ba to formulate a clear set of objectives that provide direction and purpose. That the concept of ba is not foregrounded in strategy literature in a knowledge management perspective nor knowledge management literature in a strategy perspective is supported by a literature review, although not focusing on strategy, but leadership which I consider an associated research area, which shows that only nine studies out of 44 included the aspect of ba in the knowledge dimensions covered (von Krogh et al., 2012). The above-cited studies point out the importance of ba in connection with various aspects of strategy, but none of them have actually described the deliberations that precede the concrete empirical ba construction process in an organization as well as its implementation in an organization. From their various perspectives, they propose that a ba may be valuable in a particular context or empirically identify them – no studies that I was able to find concerned ba creation in a strategy context. Therefore, I posit that a study of how a ba that mobilizes knowledge to support strategy implementation can be designed and executed is a valuable and novel contribution to strategy literature. It can also benefit companies such as the diesel engine company in need for knowledge mobilization to connect the dimension of strategy with the dimensions of structure, processes, rewards, and HR policies, but lacking a method for how to do it. In the next section, I propose a model for how to develop and execute a ba in the form of a strategy implementation workshop.

2.4 Designing a space for knowledge mobilization in connection with strategy implementation

In this section, I will propose that interview technique from narrative therapy can advantageously be used to generate a ba for knowledge mobilization and strategy alignment. I will present a theoretical model that shows how the ba in the form of a workshop can establish relations from the strategy dimension to the dimensions of structure, processes, rewards, and HR policies. I will also introduce the design approach ‘iterative prototyping’ (Dow, Heddleston, & Klemmer, 2011; Liedtka, 2000, 2015) and propose that it can help the design process of a dialoguing and systemizing ba in a strategy implementation context in a resource-scarce organization.

2.4.1 Interview technique from narrative therapy as facilitation technique

Narrative therapy is a psychotherapeutic practice (White & Epston, 1990) that focuses on the client’s explication of the causes and effects of problems and subsequent (knowledge) creation of possible future actions to solve or minimize the effects of the problem. Transferring narrative therapy to an organizational context has been said to offer “intriguing possibilities” (Barry, 1997, p. 35, see also Barry & Elmes, 1997). Narrative therapy theory and practice were formulated by Australian social worker Michael White (co-authored by David Epston in the seminal work White & Epston, 1990) as a way to enable children to formulate their psychological problems and the problems’ effects. A fundamental assumption in narrative therapy is that clients’ stories about problematic events and their associated negative effects can be causally and temporally deconstructed in an interview with a therapist (White, 2011). The purpose of the deconstruction is to enable the client to imagine and reflect

on possible future actions s/he can perform to reduce the effects of the perceived problem (White, 2007). In a strategy context, it is in this reflection, shared in a ba space, that projections about the future triggered by stories about the past are enabled thus potentially bringing about organizational change and strategy alignment provided that the ideas can be implemented effectively.

The conceptual similarity between the interview technique in narrative therapy and the knowledge creation processes of the SECI sequence in a moderated ba suggests the interview technique is well-suited for facilitating strategy workshops (see Table 2.5). White (2007) described six interview guides, or “maps” as he called them, that he found particularly applicable in narrative practice. Each map has a number of steps corresponding to reflection levels, and each level has a particular function in the interview. Three maps in particular may be relevant to strategy²: first, position map 1 that facilitates deconstruction and reflection about a problem through externalization; second, position map 2 that facilitates deconstruction and reflection about possible solutions to a problem through externalization of events that run counter to the problem and which are often not remembered by the client; and third, scaffolding conversations that facilitate reflection about possible future actions. Evaluating problems and solutions to problems, which is sought through position maps 1 and 2, respectively, is a core activity in strategy practice (Mirabeau & Maguire, 2014, p. 1211) as is the evaluation of specific possibilities for action (Healey, Hodgkinson, Whittington, & Johnson, 2015, p. 514), which is the objective in a scaffolding conversation.

² The three remaining maps are mainly relevant in a therapeutic context because they deal with positioning of the client’s identity by ascribing meaning to action (re-authoring conversations), building up identity through recognition of other people’s contributions to one’s life (re-membering conversations), and enacting appreciative rituals that upgrade one’s life in the presence of carefully selected witnesses (definitional ceremonies; White, 2007).

The three interview maps from narrative therapy facilitate a specific and experience-near account of problems, solutions or possible future actions through externalization which also constitutes the E of SECI. When such an account has been established, the effects of the problem, solution or future action are described and evaluated, and the evaluation is justified. The interview maps go to lengths to achieve deep reflection and thick stories (Cunliffe, 2010, p. 225; Miles, Huberman, & Saldaña, 2014, p. 313), thus furthering the client’s externalization of problems, as well as solutions. The goal is to facilitate the formulation of possible future action that reduce the effect of the problem so that the client exercises his/her agency (Hutto & Gallagher, 2017, p. 158) and performs the action. This is consistent with combination (C) of SECI in which new knowledge about the problem and possible mitigating actions are combined, systematized and subsequently internalized (I), that is, enacted (Nonaka et al., 2000, p. 16).

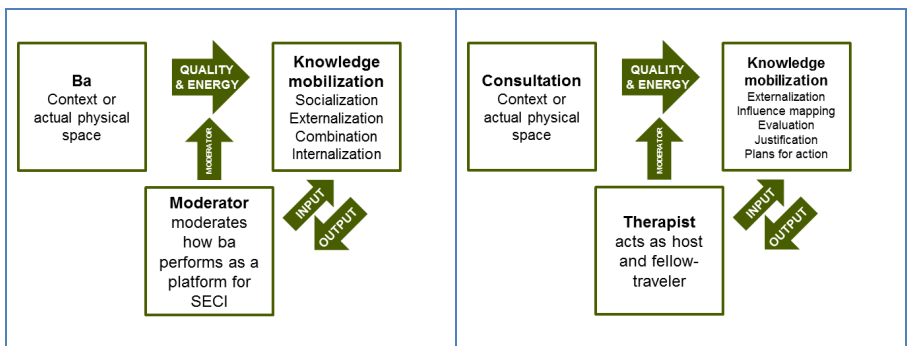


Table 2.5. Comparison of Nonaka et al’s (2000, p. 8) framework for knowledge creation (left) and narrative therapeutic practice (right) (my interpretation of White, 2007 inserted in the Nonaka framework)

I propose that the interview process of narrative therapy can create a dialoguing and systemizing ba for mobilizing knowledge in the context of organizational strategy implementation. The ba can be a continuous context or time limited actual physical space. In narrative therapy, it is the consultation, i.e. a fixed time and place for therapy, that establishes a dialoguing and systemizing ba, and subsequently, if the therapy is successful, an exercising ba where the client can enact the solutions that were found in therapy. For knowledge to be mobilized, the participants at the ba need quality and energy, which can both be moderated or facilitated. In narrative therapy, the therapist acts as moderator and facilitator of the client's knowledge mobilization. The therapist can adapt his/her role and input to the client according to the client's output. The process of knowledge mobilization is achieved through initial socialization, where knowledge has already been internalized through everyday enactment, which is then followed by externalization, combination and (re-)internalization. In narrative therapy, tacit knowledge about the problem and its associated solutions is externalized, the problem's and the possible solutions' influences are mapped, evaluated, and justified – and ultimately plans for own action can be proposed by the client.

The empirical challenge for organizations such as the diesel engine company is how to set up a ba where this knowledge mobilization process can be facilitated. In the next section, I propose the design principle 'iterative prototyping' as a promising approach in a strategy implementation context to designing a ba in the form of a workshop where the knowledge mobilization model can work.

2.4.2 Iterative prototyping as workshop design approach

Iterative prototyping is a collaborative design process with four steps: first, all possibilities are envisioned; then a prototype is created based on the theoretically

most promising possibility; third, feedback is obtained through empirical testing; and lastly, the prototype is (re-)evaluated (Dow et al., 2011). Iterations of these four steps are repeated until the design has been sufficiently optimized. The sufficiency is related to the available resources, that is, the time available for iterations until the final design must be delivered, the number of designers and users available for co-developing the design, and, indirectly, the finances related to time consumption and involvement of people. Companies often avoid iterative prototyping due to an expectation that the cost does not correspond with the benefit (Salas & Huxley, 2014; Schrage, 2013), but it has been empirically shown that iterative prototyping outperforms hypothesis-driven design processes without empirical iterations to continuously test the design (Dow et al., 2011; Liedtka, 2015). In a product and process design perspective, learning from iterative prototyping can be carried into the next design (Ericsson, Charness, Feltovich, & Hoffman, 2006), and learning about the product or process has been emphasized as more important than the actual empirical testing and display of functionality (Liedtka, 2015, p. 927).

In their entertaining study, Dow et al. (2011) observed the iterative prototyping design process of an egg drop vessel, i.e. a container for a raw egg that should be designed to protect a raw egg from a fall. They found that iterative prototyping was superior to hypothetical design, and that eggs in vessels designed through iterative prototyping could be dropped from a higher altitude than eggs in vessels that were not refined through iterative prototyping. In Ingerslev (2014), healthcare professionals used LEGO bricks to build prototype mock ups of a complex patient identification tool which was tested in clinical iterations. Similarly, iterative prototyping is widely known in IT where large-scale launches of applications have been replaced by small iterations that are pushed out to devices, such as mobile

phones. When a flaw is discovered, an updated can quickly be distributed. This was already identified as a promising avenue for programmers in the early 1990s where Nielsen (1993) found that iterative prototyping of user interface design was “much faster than standard programming” (p. 36).

These studies all used an iterative prototyping approach to designing an object; an egg-drop vessel, a complex patient identification tool, and a user interface, respectively. But how can iterative prototyping be used to design a process when there is an absence of a product as such, but where the process itself is the product? I call attention to the concept of modularity. The use of LEGO bricks in design processes (Bürgi, Jacobs, & Roos, 2005; Roos, Victor, & Statler, 2004), for instance, has been described as modular (Bürgi et al., 2005, p. 91). Shapira (2011) uses this example to describe a modular assembly process:

The watches Hora made were no less complex than those of Tempus. But he had designed them so that he could put together subassemblies of about ten elements each. Ten of these subassemblies, again, could be put together into a larger subassembly; and a system of ten of the latter subassemblies constituted the whole watch. Hence, when Hora had to put down a partly assembled watch to answer the phone, he lost only a small part of his work, and he assembled his watches in only a fraction of the man-hours it took Tempus. (Simon, 1981, p. 200 cited in Shapira, 2011, p. 1318)

I propose that a modular workshop process makes it easy to assess the individual modules compared to a non-modular workshop process that is assessed in its entirety. In addition to using interview technique from narrative therapy to mobilize knowledge in a strategy implementation context, I also propose to combine it with iterative prototyping to develop a ba in the form of a concrete workshop process. The

workshop process both provides an actual physical space, i.e. a meeting room where the workshop can take place at the company, and the context of the impending strategy implementation and is thereby the space where knowledge mobilization can take place (see Fig. 1). Figure 1 shows three changes to Nonaka’s (2000) framework for knowledge creation that are particular to a strategy implementation context: the ba has been specified as a concrete workshop with employees that is designed through iterative prototyping, the moderator has been specified as a workshop facilitator, and the SECI sequence has been adapted to the stages of an interview in narrative practice. In the next and final section of the theory chapter, I will describe how this model for knowledge mobilization plays into and can enhance a deliberate approach to strategy.



Figure 2.1. Knowledge mobilization in the context of strategy implementation

2.5 Introducing elements from an emergent strategy approach in a deliberate strategy approach

In this chapter, I started by outlining the differences between the deliberate and emergent approaches to strategy. In short, the deliberate approach separates strategy development and implementation because it is done by organizations with long planning horizons that can afford to take time to first develop the strategy and then implement it top-down through the organizational hierarchy. In contrast, strategy development and implementation are intertwined in the emergent strategy approach where strategy emerges through involvement of frontline workers and can therefore be said to be implemented at the same time as it is formulated. The dimensions of structure, processes, rewards, and HR policies need to be revised for organizational change in connection with strategy implementation to take place. Managing the dimensions is particularly relevant in a deliberate strategy approach where the change needs to take place just before or as implementation takes place. In the emergent approach, the changes may already have taken place when the strategy is developed because it involves the organization to a greater extent. However, a company that has not worked with strategy before or in the recent past needs to establish relations from the strategy dimension to the dimensions of structure, processes, rewards, and HR policies. This can be a challenge to companies such as the diesel engine company: how can knowledge that establishes the relation from strategy to the four other dimensions be mobilized to align employees' actions with the strategy and thus drive organizational change?

Figure 2 shows that the relations from strategy to structure, processes, reward systems, and HR policies can be established through mobilizing knowledge. The knowledge mobilization is shown in Figure 1 and draws on iterative prototyping to

design an originating ba. The knowledge mobilization also draws on a strategy implementation workshop as the actual physical space that constitutes a dialoguing ba, which is facilitated by interview technique from narrative therapy, and a systemizing ba where employees' tacit knowledge can be elicited and applied. After the workshop, an exercising ba is established when employees go back to their desks and start implementing the actions that are aligned with the strategy, thus enacting the just-mobilized knowledge. It is through the application of externalized knowledge that the relations from strategy to the other dimensions are established and strategy becomes a driver for organizational change.

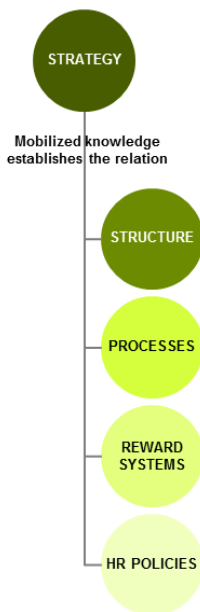


Figure 2.2. Aligning organizational change through knowledge mobilization in a workshop as ba space and strategic episode

The proposed strategy implementation workshop draws on elements from the emergent strategy approach with its bottom-up process orientation. However, it is not a true emergent strategy process because it does not feed into the actual formulation of strategy – the strategy formulation has already been fixed by top management before this workshop starts. Rather, the workshop supports and complements the top-down implementation of the strategy by adding a knowledge management and learning element (Liedtka, 2000, 2015) in the strategy implementation process. Instead of relying on the trickle-down cascade (Noble, 1999) in a typical top-down implementation style, the strategy interpretation process can start with frontline workers, thus allowing them to establish links from everyday tasks and experiences to the strategy. This bottom-up workshop does not counter or supplant the trickle-down interpretation of strategy and key performance indicator planning by middle managers, but complements it.

A strategic episode is an opportunity to “escape the constraints of the operating structures” of the organization (Hendry & Seidl, 2003, p. 188). A strategy implementation workshop as a ba establishes a strategic episode for the participants who are invited into a space where a resource-scarce organization’s rushed delivery deadline focus continues outside the space, but not inside. The participants can be said to enter another organizational temporality (Langley, Smallman, Tsoukas, & Van De Ven, 2013, p. 4) that allows them to dwell (Chia & Rasche, 2015, p. 48). The dwelling state enables them to go deep into the process of knowledge mobilization where internalized predispositions are adjusted and adapted (Chia & Rasche, 2015, p. 49) through a process of interpreting perspectives and perceptions and justifying them through dialogue (Hislop, 2013, p. 107). Knowledge mobilization at a strategic episode in the form of a constructed ba may be a particularly valuable tool for

resource-scarce organizations because the organization's rushed production cycle is put on hold for the ba participants, thus allowing them time for thought and dialogue.

Deep immersion in knowledge mobilization through thought and dialogue in a space with slower temporality than the organization's normal temporality can lead to a "highly intrinsically motivated [state]" for the participants and a work output that is "novel, original, and useful" (Mainemelis, 2001, p. 549). This state has been labeled 'timelessness' (Mainemelis, 2001). Timelessness as a manifest experience is characterized by four components: first, being fully absorbed by an activity; second, "operating according to the rhythm of the activity", not the rhythm of the surroundings, and recognizing that "time has passed in a different way than usual"; third, developing the participants' skills through engagement in "an optimally challenging task"; and fourth, "stepping temporarily outside [...] the normal psychological context delineated by [...] time" (Mainemelis, 2001, p. 557). A hectic work environment with a high workload and distractions works against deep immersion and inhibits reflection. Through deep reflection in a space for dwelling, people can distance themselves from the known although tacit and mobilize knowledge by discovering something new (Bruner, 2002, p. 77; Mainemelis, 2001, p. 559; White, 2011, p. 79). Although Mainemelis does not relate his concept of timelessness to the process of knowledge mobilization, the abstract notion of a ba, nor the specific notion of a workshop as I propose here, the similarities are striking in my reading and serve to support my proposition that participants of a ba can detach themselves from an organization's temporality and enter another, slower temporality that enables them to achieve deep and intense reflections.

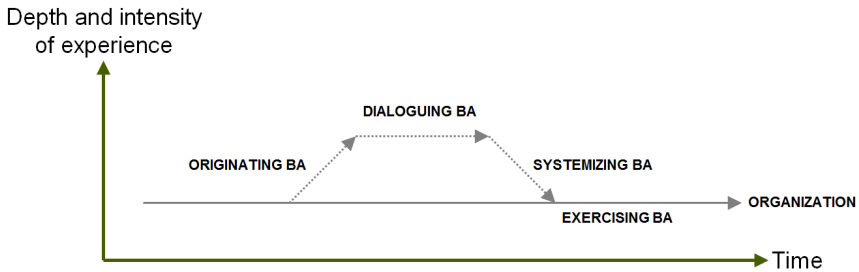


Figure 2.3. *Ba as a space for timelessness (coordinate system proposed by Mainemelis, 2001; the model in the coordinate system is my own design)*

Figure 2.3 shows that a ba can function as an alternative organizational temporality that provides the participants a space for knowledge mobilization while the rest of the organization remains unaffected and continues as usual. After the workshop is finished, the participants rejoin their colleagues in the usual temporality, but it may now be an exercising ba for the participants, where they can internalize and apply the knowledge that was mobilized at the workshop. In my reading, it was this type of continuous exercising ba that was observed in the ba studies cited above. What remains to be investigated, and where I seek to contribute, is to explore the process of practically constructing an originating ba, a dialoguing ba, and a systemizing ba, which are all necessary for an effective exercising ba.

The empirical papers in this Industrial PhD study address various aspects of the proposed model for knowledge mobilization. The first paper precedes the model and explores whether interview technique from narrative therapy can facilitate the *development* of a strategy formulation. The three other papers directly target the model: the second paper explores whether, and if so how, iterative prototyping can be used to develop a strategy implementation workshop design. The third paper explores

and assesses the effectiveness of the strategy implementation workshop design. The fourth paper zooms in on the micro activities at the strategy implementation workshop and tries to find patterns in the narrative interview technique that can help the facilitator run an effective workshop. Seen in total, the papers enable me to answer the research question: i.e. whether employees' actions and company strategy can be aligned in a resource-scarce organization at a knowledge mobilization workshop whose design is developed through iterative prototyping and which is facilitated by interview technique from narrative therapy.

In the next chapter, I will describe how I collected the data for the papers and my dual role as industrial researcher where I was simultaneously employed by the diesel engine company and an action researcher.

3. Method

Before proceeding to presenting the facts about the data collection and the events leading up to it, I will shortly describe the method. The method is a single company multiple case study using qualitative data analysis supplemented by a simple statistical effectiveness assessment – the principles of action research were applied to all workshops which I facilitated myself. I was thus instrumental in taking and making action and bringing about organizational change. In total, data was collected at 11 workshops: one that concerned strategy formulation in 2012 and ten that concerned strategy implementation in 2016. Each workshop enabled an in-depth study of strategy praxis within its real-world context (Corbin & Strauss, 2008, p. 325; Yin, 2013, p. 16). Further, statistical data was collected at six workshops that I did not facilitate and used as a control group to assess the effectiveness of the workshop method with narrative facilitation. Additionally, evaluations of the project’s findings by strategy consultants were collected as secondary data which led to two card sorting and labeling exercises with employees at the diesel engine company.

The purpose of this chapter is to give a transparent account of how opportunities for data collection arose at the company. As an insider action researcher, I did not create the research setting myself, but let top management’s intentions for strategizing practice drive my efforts. This action research data collection situation differs from ethnographic data collection methods where a protocol for data collection can be planned by the researcher (Yin, 2013, p. 84) The knowledge that could be collected in this project is therefore a “byproduct” of taking active part in the strategy process at the company (Schein, 2008, p. 266). The main product, which was asked for by top

management, was the execution of successful workshops and mobilization of knowledge (von Krogh et al., 2012) of the employees who participated in the workshops.

3.1 Data collection

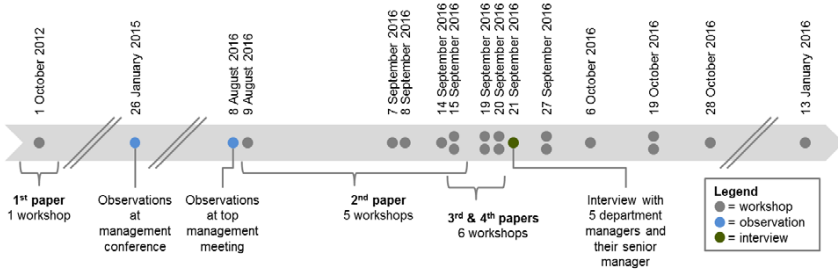


Figure 3.1. Overview of primary data collection

Figure 3.1 shows the data collection. In the following, I will first describe the circumstances surrounding the data collection for the workshop in 2012. Second, I will describe the management decisions leading up to the development and execution of the strategy implementation workshops where I collected data in September 2016. Concerning the management conference on 26 January 2015, I was asked by the head of the strategy department to facilitate the conference which provided the opportunity to make an audio recording of it and to make observations of the top managers who gave presentations at the conference. While this provided an opportunity to observe interaction among the top managers, I ended up not using it in the analyses in the papers. The interview with five department managers and their senior manager on 21 September 2016 was a debriefing meeting where we evaluated the workshops I had facilitated for the managers. The department managers, who had each participated in one workshop, did not add to the evaluation they had already given in connection

with their respective workshops, and while the senior manager listened with interest to our evaluation, she did not make comments that added to the participants' evaluations, but rather supported them. I ended up not using this interview in the analyses in the papers because it did not add to the analytical findings in the transcripts. The other data collection points will be described below.

3.1.1 The strategy development workshop in 2012

On 24 May 2012, I received an email from the department manager of a newly established purchasing department with the following brief (translated from Danish): “We would like to have a department workshop on how we want to live up to the company’s values and what values we want to bring into play ourselves. Have heard from HR that you may be able to help us here? I was wondering if you could be the facilitator [...]? Hope you are enjoying your paternity leave.” When I returned from paternity leave, I met with the department manager and we discussed the possibilities for what kind of product she would like to produce at the workshop. She realized that instead of focusing on just values, we could enlarge the scope she had originally planned for the workshop and try to develop a department mission statement and vision. On 30 August 2012, I facilitated a short test workshop with just the department manager and one of her team leaders as the only two participants where we tested whether it made sense to use interview technique from narrative therapy to facilitate the workshop with the entire department. I sent her the documentation of our test workshop in an email in the afternoon and in the evening of the same day she replied, “[the result of the workshop] is pretty similar to a mission and vision we have already drafted [which the employees had not yet seen], except we want a holistic/overall economic approach. The time horizon [which I had enquired about] I would say is 3-5 years. But a super cool [Danish: superfed] approach to a value workshop with lots of energy.”

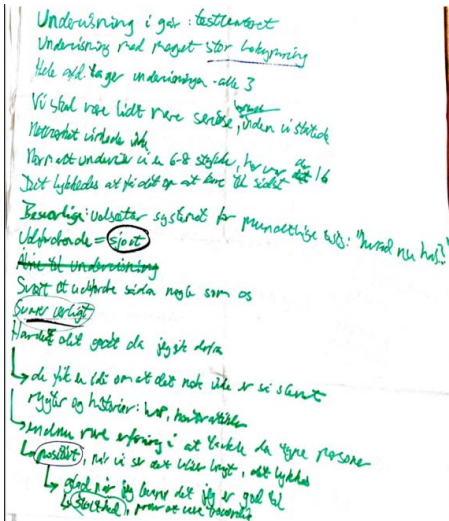


Figure 3.2. Workshop notes on a flipchart – the underlining and circling of keywords were done by the workshop participants

The workshop with employees in the new purchasing department was held on 1 October 2016 and has been accounted for in Kryger (2017, the first empirical paper in this dissertation) and in a practitioner-oriented book in Danish (Kryger, 2013). The data consisted of flipcharts with notes from the narrative interviews and reflections at the workshop – see an example of a documentation flipchart in Figure 3.2. No audio recording was made. The objective of the workshop was to develop a department mission and a department vision based on the employees’ values. Because the department was newly established, the department manager wanted to not just reflect on the corporate values, but elicit and develop the employees’ joint values as a starting point for defining what drove them (mission statement) and what they foresaw they would be able to achieve in a 3-5 year horizon (medium-term vision)

when capitalizing on their values. While the department manager and one of her team leaders were engaged in a test workshop prior to the actual workshop, the entire department was engaged in sharing stories about events from their respective work lives at the actual workshop. They then defined their values by circling and underlining words on the flipcharts with their stories. Their values were used to co-author a joint mission statement and a joint vision for the department. Relationship and trust building at the workshop were prerequisites for co-authoring values, a mission statement and a vision. The work effected positive local change in the purchasing department: the results of the workshop had meaning for all participants and relevance for the purchasing organization as a whole, beyond the department in Copenhagen. It also supported the flourishing of persons (Huang, 2010, p. 103), i.e. "having meaning and relevance beyond an immediate context", in that the products of the workshop were used at a number of occasions after the workshop, e.g. appraisal talks, regular department meetings, and job interviews.

The events that led up to the workshop and the workshop itself are symptomatic of the work of an in-house strategy consultant. The events show how a manager's idea about a workshop product such as a definition of values, a mission statement and a vision can be explicated and negotiated in dialogue with a facilitator and how the negotiation process can culminate in a strategy practice (a workshop in this case) that produces the desired product(s). Attention to the praxes that led to the realization of the desired products can yield an understanding of how a workshop can be facilitated by narrative interview technique. Both the pre-workshop dialogue with the department manager and the team leader and the workshop were a result of collaborative reflection between the manager, team leader, employees and the strategy consultant. The reflections took place in action and the knowledge that was

mobilized was used for collaborative purposes in action. The knowledge that was generated was actionable in two dimensions: the department manager could use the documentation of the workshop to manage the department and I could use it to enlighten my own and possibly other strategy consultants' practice. In the dissemination of the work, I focused on anonymization of the participants, so that their personal stories and preferences at the workshop would not be disclosed. I anonymized the workshop participants by not citing names at all in Kryger (2017) and only using an arbitrary initial letter for the quotes in Kryger (2013). In both publications, I arbitrarily selected the gender of the cited participants.

In summary of the data collection for the workshop in 2012, it reflects the approach of the clinical researcher who seeks to capitalize on an emerging possibility for generating knowledge that can both be actionable to a client, in this case the purchasing department manager, and a practice community, in this case strategy consultants. The dissemination of the clinical research is convergent with the "just the facts" empirical paper suggested by Oxley, Rivkin, & Ryall (2010): introduction and motivation, description of data and methods, presentation of results, and discussion of the relevance of the findings to theory and empirical facts, which matches the structure of the article published as Kryger (2017). The intended contribution of the "just the facts" empirical paper is to contribute to knowledge on knowledge mobilization in a strategy context through insights that are unique for the action researcher as facilitator of the workshop process and which can only be obtained with difficulty by an ethnographical researcher. The difficulty of an ethnographer of obtaining the same results can, of course, be disputed. I argue that the position as action researcher in this particular case provides an embeddedness in terms of organizational membership, network at the company and contextual

understanding of how the purchasing department is positioned in the organizational hierarchy and its historical development (Herepath, 2014; Jarzabkowski, Balogun, & Seidl, 2007) that an ethnographer cannot easily observe. Further, the actual use of narrative interview technique in the workshop situation yields insights of another character than what can be merely observed; insights that are particularly informative at the praxis level of strategizing and can benefit strategy consultants.

3.1.2 The strategy implementation workshops in 2016

As Senior Business Strategist at the company, it was one of my responsibilities to follow up on the employee engagement survey (see Table 3.1). The 2016 installment of the employee survey ran from 30 May to 26 June 2016. The employee survey is generally not well accepted by the employees because departments need to evaluate and follow up on the result and the follow-up process has been unstructured and unsystematic in the past - the main point of critique being that the follow-up action plan was not used for anything and lacked strategic alignment and anchoring and was thus perceived as being detached from other action planning at the company. Since joining the strategy department in 2016, it became my responsibility to improve this situation and implement a structured follow-up process that was generally accepted by the employees and one that included an alignment with strategy. This employee survey follow-up process in 2016 coincided with the implementation of a revised strategy for the two-stroke diesel engine division and it was therefore obvious that the survey follow-up should be aligned with the implementation of the revised strategy. The objective of the workshops was to ensure alignment of action planning with strategy which had been criticized in the past. Therefore the workshops was labeled 'strategy implementation workshop' and the employee survey worked as the problem indicator.

Our team/ Organizational Unit (OU)

1. Our organizational unit (OU)/team has the necessary resources to do our work.
2. Knowledge and expertise is shared within our OU/team.
3. I have access to the training necessary for my job.
4. We take sufficient steps on our OU/team to ensure we are working efficiently.
5. We are taking sufficient steps to ensure quality on our OU/team.
6. Our OU/team is able to adapt to changes and react to problems quickly.
7. Our OU/team has sought to make positive improvements in a variety of ways over the past 12 months.

Our collaboration

8. Our OU/team complies with company rules and processes in our effort to meet business objectives.
9. Roles, processes and operating guidelines are clearly and consistently communicated in our OU/team.
10. Our OU/team openly discusses potential risks and mistakes in a healthy manner.
11. Collaboration with colleagues on other teams is good.
12. Our OU/team promotes an environment of open and honest communication.
13. My immediate supervisor has strong leadership qualities that serve as an example to others.

My work

14. I enjoy my current tasks.
15. My individual contribution is recognized by others.
16. I am free to share my opinion/ideas on important, work-related topics.
17. I am able to perform my required job functions.
18. I am currently dealing well with the expectations placed on me.
19. I have a good balance between my work and personal life.

Me at the company

20. I believe the company is an attractive employer.
21. There are professional development opportunities for me at the company.
22. The company is viewed positively by the public and by our customers.

Table 3.1. The employee engagement survey – employees evaluated each statement by using a five level likert scale spanning strongly agree, agree, mixed opinion, disagree, and strongly agree; resulting in an index value spanning 100-0; the larger the value, the higher the satisfaction

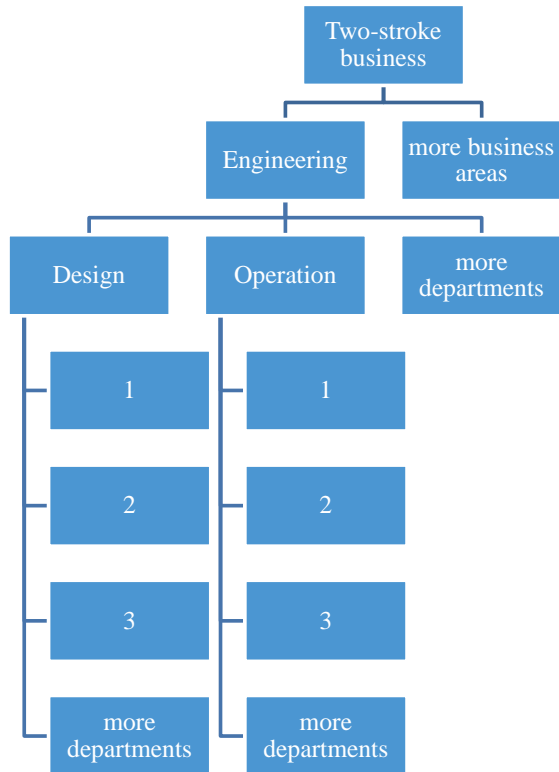


Figure 3.3. Organizational structure at the time of data collection with focus on the two-stroke engineering business area for whom the 2016 workshops were held

An index overview comparing the Copenhagen two-stroke division with the international company average showed a critical result for particularly two statements that were judged by top managers in the two-stroke division to be business critical: “roles, processes and operating guidelines are clearly and constantly communicated in our OU/team” which was 6.8 index points under the company average and “our

OU/team complies with company rules and processes in our effort to meet business objectives” which was 6.4 index points below average. The result showed that there were problems that needed to be solved. The result was emphasized by an observation I made at a top management meeting on 8 August 2016 where the results of the employee survey were evaluated by the top managers: the research and development director stated that the employees knew the processes, but that they were not necessarily documented. The head of the two-stroke division agreed and stated that the processes had been internalized. There was general agreement among the top managers that this situation resulted in the low index scores.

The average index score for the company as a whole was 74.4 based on participation of 13,590 employees. For the two-stroke division as a whole, it was 76.2 based on participation of 680 employees. For the Engineering Operation department as a whole, it was 70.1 based on participation of 81 employees (see the organizational structure in Figure 3.3) which was the lowest score in the two-stroke business. As a consequence, this department, with its sub-departments, was chosen as a particular focus area in the follow-up process. The focus would be given by me facilitating their workshops. My facilitation was also offered to all other departments, but on a voluntary basis. This decision was made at the top management meeting on 8 August by the head of the division in agreement with the head of the Engineering business area. Because I had already planned to facilitate the workshops for five Engineering Design departments, I agreed with the respective department managers that I could use their workshops to iteratively test prototypes to learn how different workshop designs worked together in pursuit of the most effective design that I would then apply to the most critical workshops with the Engineering Operation departments.

That my empirical sample would end up including data from workshops with Engineering Design and Engineering Operation was therefore a combination of organizational embeddedness and network that allowed me to draw on my network, to use the Design departments to develop the workshop design, while fulfilling my task to execute the critical workshops with the Operation departments – see an overview of the workshops in Table 3.2. In the paper describing the five workshops where the design was developed and in the papers of the workshops where the finalized design and facilitation technique was used, I chose to include workshops with both Engineering Design and Engineering Operation. My reason for this choice was that the facilitation praxis could be generalized across the workshops, more specifically case study generalization, as is known from the field of psychology that rests firmly on case studies, that could subsequently be used to enlighten strategy consultants and scholars alike (Schein, 2008).

As can be seen from Figure 3.1 and Table 3.2, more workshops could have been included in the sample. However, since I judged data saturation (Corbin & Strauss, 2008) and pattern consistency (Eisenhardt & Graebner, 2007) to be reached after conducting six workshops with the final design and experiencing similar workshop dynamics, I stopped sampling and turned my attention to analysis. As Figure 3.1 and Table 3.2 show, this choice did not mean that I stopped facilitating workshops. My decision that data saturation was reached and similar patterns could be identified across the dataset was not based on transcriptions: the time between the workshops did not leave time to transcribe the audio recordings. On the afternoon of 20 September 2016, I was absolutely immersed in the workshop praxis after having conducted four 3-hour workshops for different departments in two days. I had a palpable sense of connectedness with the workshops and found myself remembering

each stage of the workshops vividly. This closeness to data later facilitated the transcriptions, coding and analysis, but on that particular afternoon, I was convinced that concluding the data collection was the right choice. No surprises had emerged at the latter workshops which followed the same patterns as the previous ones. The content, naturally, differed, but the facilitating praxis and workshop process was the same. Transcribing and coding the audio recordings shortly thereafter confirmed my conviction of the afternoon of 20 September that the sample was adequate to illustrate the workshop practice and to enable analytical generalization across the cases, that is, workshops. I remain convinced that my proximity to the data and the immersion in action I undertook to generate the data enabled me to make the right choice concerning sample size.

In the development phase of the workshop design, the workshop participants, the department managers, colleagues at the company and academic peers acted as reference groups who helped me evaluate the workshops. Our joint evaluation of the workshops drove the development of the workshop design in the development phase. In the execution phase, when the workshop design had been finalized, the workshop participants still evaluated the workshops, but related to content and not process as was the case in the development phase. With the focus on the development of the workshop design I sought to generate insight into whether and how a workshop design can be developed through iterative prototyping. With the focus on the workshops that were held using the finalized workshop design, I sought to generate insight into whether and how narrative interview technique can be used to solve problems and ensure alignment with strategy in an organizational strategy implementation context. I further sought to contribute to theory on how a ba for knowledge mobilization can be created in a strategy context. The workshops had

Workshop number	Sample for paper 2: development of workshop design	Sample for papers 3 and 4: finalized workshop design	Department	Workshop design	Date	Number of participants
1			Design	1. Storytelling 2. Definition of core competences, business area, desired public image, technology 3. Brainstorm about possible future action	9 Aug	7
2			Design	1. Storytelling 2. Definition of core competences 3. Brainstorm about possible future action 4. Link actions to strategy	7 Sept	6
3			Design	1. Discussion of employee survey results 2. Brainstorm possible future actions 3. Prioritization and selection of action 4. Develop action plan 5. Link actions to strategy	8 Sept	6
4			Operation	(same)	14 Sept	5
5			Design	1. Strategy introduction 2. Discussion of employee survey results 3. Brainstorm possible future actions 4. Prioritization and selection of action 5. Develop action plan 6. Link actions to strategy	15 Sept	6
6			Design	(same)	15 Sept	7
7			Design	(same)	19 Sept	5
8			Operation	(same)	19 Sept	11
9			Operation	(same)	20 Sept	9
10			Operation	(same)	20 Sept	5
11			Other	(same)	27 Sept	7
12			Operation	(same)	27 Sept	8
13			Operation	(same)	6 Oct	16
14			Other	(same)	19 Oct	18
15			Other	(same)	19 Oct	6
16			Operation	(same)	28 Oct	7
17			Operation	(same)	13 Jan	7

Table 3.2. Overview of strategy implementation workshops conducted in 2016. Workshop 5 is included in both the blue and green samples. Workshops 11-17 are excluded from both samples. All workshops had a duration of 2.5-3 hours.

meaning and relevance for the participants who positively evaluated the workshops by comparing them to the much criticized unstructured former follow-up process. Some of the department managers stated that the workshop provided them with a structure that they had been missing in the past. Feedback at the workshops and after from department managers indicated that problems had been addressed, which had been irritating the employees for a long while, but which the managers had not known how to address. Some of the employees expressed in various ways how they felt more familiar with the strategy after their workshop than they had before. I did not make a follow up study with the respective departments, but focused exclusively on the workshop events, so the longitudinal effects of the workshops were not an attention point. The dissemination of the multiple case study inspired other strategy and change management consultants at the company to use the same workshop design and to familiarize themselves with narrative interview technique, also at other locations than Copenhagen.

3.1.3 Secondary data collection in connection with the statistical outcome assessment as part of the case study evaluation

After finishing the last part of the analysis of the 2016 workshops, I disseminated the findings to strategy consultancies. Before presenting the workshop design and narrative facilitation technique to the consultancies, whose selection is described in the third paper, I foresaw the ubiquitous question: ‘how do you know your design/facilitation works?’ So I set out to make what Yin (2013, p. 224f) calls a quantitative outcome analysis as a part of a case study evaluation. Outcome in my case differs from longitudinal organizational change because it refers to the immediate results of the case study, i.e. the documentation from the workshops: I numerically quantified the participants’ prioritization of the actions that they defined during the workshop, and compared the numerical values with comparable numerical

values from workshops without narrative facilitation. This resulted in the statistical effectiveness assessment described in the third empirical paper which concludes that using narrative interview technique to facilitate strategy implementation workshops is significantly more effective than not using the facilitation technique. I presented this finding to the consultancies thus emphasizing the spirit of action research where developing better practices, not only locally in a company, but in a practitioner community across companies, is crucial.

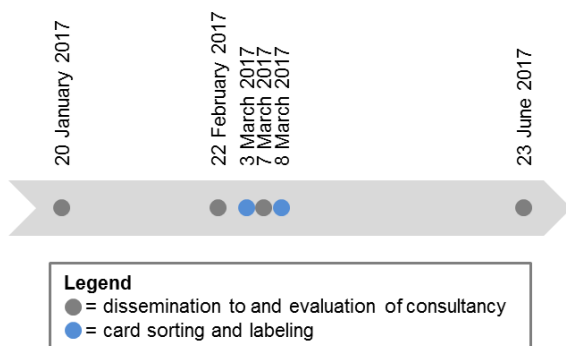


Figure 3.4. Overview of secondary data collection undertaken in connection with dissemination activities

Based on the consultancies' feedback, I set out to make a standalone guide to narrative workshop facilitation, i.e. one that could work without the physical presence of a trained narrative facilitator. This process is also described in the third paper. As can be seen from Figure 3.4, the timeline of the dissemination to consultancies and the card sorting and labeling exercises with employees that worked as the cornerstone in developing the standalone interview guide is symptomatic of action research where the company's and the consultancies' production schedule took priority over the research process. As a positive result of this unstructured process, however, I could

disseminate more to the third consultancy and the complete picture including the standalone interview guide to the fourth consultancy because it had been finalized in the meantime. The presentation to the consultancy on 23 June 2017 concluded all data collection. Dissemination at the company and through networks continues.

3.2 Action research and the dual role of the insider action researcher

The distinctive characteristic of action research is that “it addresses the twin tasks of bringing about change in organizations and in generating robust, actionable knowledge” (Coghlan, 2011a, p. 54). Action research is done in partnership with practitioners and includes them in the process of creating actionable knowledge (Huang, 2010, p. 95). When knowledge is created, there is also learning to be had, and learning is central to action research: what separates action research from ethnographic methods of data collection is participation in action because without change, there can be “no meaningful and sustainable theoretical learning” which is where Kurt Lewin’s adages of “there’s nothing so practical as a good theory” and “if you want truly to understand something, try to change it” comes into the picture (Greenwood, 2015, p. 200). The learning that is sought in action research comes from deep contextual understanding and action-taking, and it is argued that “only through action is legitimate understanding possible” (Huang, 2010, p. 93). Taking active part in organizational change enables the action researcher to engage in cycles of action and reflection that stimulates contextual reflexivity (Huang, 2010, p. 98). More specifically, the learning process for the action researcher consists of cyclical iterations of perceiving through observation and reaction, understanding through judgment, and acting through intervention (Coghlan, 2009, p. 118). The learning can then be offered to the wider community of practitioners such as managers and

strategy consultants to improve their situation and scholars to enhance their understanding (Coghlan & Shani, 2008; Dick & Greenwood, 2015; Zuber-Skerritt & Perry, 2002), in fact dissemination is imperative and a constituting building block of action research.

From an ontological perspective, organizational practitioners have knowledge that is essential to bring about organizational change (Greenwood, 2015, p. 200). From an epistemological perspective, the cyclical iteration of perceiving, understanding and acting means that “reliable knowledge is only generated and tested situationally and that gaining such knowledge requires the active intellectual and social engagement of the stakeholders in the situation whose interpretations and understandings are as central to the process as are the action researchers” (Greenwood, 2015, p. 205). Therefore, the iterative link between knowledge and action blurs the separation between ontology and epistemology because is it through taking action that knowledge is simultaneously brought into existence and accessed. This is a clear tension between action research and ethnographic research, the former operating in an ontology where knowledge only exists *in action* and an epistemology where the knowledge can be accessed *through action*, the latter operating in an ontology where knowledge exists in social relations and an epistemology where knowledge can be accessed through observance of language and behavior. The attention to particular events in action research has implications for its potential for generalization. Where quantitative methodology has established parameters intended for statistical generalization, action researchers assert that “we learn something general from highly particular experiences” because they are able to apply learning to future cases and transfer problem solving to other locations (Greenwood, 2015, p. 206). Rigor of scientific inquiry is thus a tension in action research (Coghlan, 2011a, p. 73):

From the perspective of AR [action research], rigor involves demonstrating that the interpretations and designed actions really work in context. AR also sees this application as the core of the true scientific method. In science, knowledge is tested by discovering if it works in the way it is supposed to in context. This is precisely what Kurt Lewin meant when he affirmed that theory is practical both because it works in action and its validity is tested in practice. (Greenwood, 2015, p. 205)

Rigor and relevance are two complimentary dimensions in action research (Huang, 2010).

Turning to the dual role of the insider action researcher, it has been defined as “a person conducting action research in an organization where he or she is also a permanent member” (Roth et al., 2011) thus applying to my position in this Industrial PhD project. Full organizational membership distinguishes the role as insider action researcher from two other major positions in action research: clinical inquiry researchers and participatory action researchers. The clinical perspective emphasizes that the researcher is asked to come into the organization as an external consultant to help the organization deal with a pathology, i.e. something that is “‘wrong’ or capable of improvement” (Schein, 2008, p. 277), which can be fixed through collaboration between the researcher and the client. The three basic assumptions of clinical inquiry/research are that the research agenda “comes from the need of the client,” that clinical researchers are “trained to recognize pathological deviations from health,” and that they have a “primary focus on treatment” as opposed to diagnosis (Coghlan, 2009, pp. 112–113) thus differing from ethnography’s diagnostic nature. The role of the clinical researcher calls for “self-insight and a healthy skepticism” (Schein, 2008, p. 276) in order to distinguish what is known, what is

assumed to be known, and what is truly not known so that learning can be achieved (Coghlan, 2009, p. 114). As contrast, participatory action research is more comparable to a standard academic research project whose initiative is taken by a researcher who then involves practitioners as co-investigators who help the researcher design, execute and interpret the findings (Coghlan, 2011a, p. 57): the research is a result of the joint efforts of the researcher and the organizational co-investigators, thus it is fundamentally participatory. The role of the participatory action research calls for skilled political navigation in the dissemination where the hearing and silencing of voices should be balanced (Coghlan, 2011a, p. 57).

The role of the insider action researcher rests on three core elements that are foundational for organizational change and generation of actionable knowledge: “managing the tensions between closeness and distance (preunderstanding), organizational and researcher roles (role duality), and managing organizational politics” (Coghlan, 2011a, p. 71). First, the tension that arises as a result of the balancing act between closeness and distance can lead to the development of enhanced theory development with potential for praxis-anchored incremental insights and practical usefulness that can contribute to organizations as well as the academy *because of* the closeness-distance tension (Corley & Gioia, 2011). Second, concerning the role duality, Roth et al. (2011) report on three insider action research studies in organizational settings highly similar to mine in this Industrial PhD project: their empirical contexts were the research and development units of large international groups with highly specialized engineers, the insider action researchers were employed by the companies while doing their PhD projects, they were previously employed by the companies in managerial positions, and in connection with their research projects, they took on more independent roles and emerged into

the researcher role through PhD course work – similar to my own journey. They report how their roles changed during the research process, not in a dichotomous way between researcher and organizational member, but deliberately turning up and down of their organizational membership while simultaneously turning up and down of their researcher role – in short, the one role does not preclude the other, rather they can co-exist and be co-constitutive of insight: “increasing the contrast of the role duality rather than alternating between two roles” (Roth et al., 2011). They also report how their disengagement from being absorbed in organizational activities was achieved through physically dividing their work week between being at the company and being at the university in order to better reflect, analyze and write up their research. I operated with the same physical division of my work week which I think positively contributed to my ability to turning up and down the contrast of my roles as insider and researcher, respectively. Third, managing organizational politics concern dynamics such as gaining access, using data, and dissemination which are considered political acts (Coghlan & Shani, 2008), and therefore insider action research can be considered subversive for the organization which stresses the political and diplomatic faculties required by the insider action researcher. Coghlan & Shai (2008) address the outcomes of the three core elements of doing insider action research:

The desired outcome in working with preunderstanding is the capability to inquire into what is close and familiar. The outcome for working with role duality is the effective utilization and understanding of the insider action research role as a learning mechanism, and the outcome for working with organizational politics is building learning mechanisms that are effective politically. (no page numbering)

Grounded in the organizational embeddedness and deep contextual understanding combined with the possibility to withdraw and reflect, analyze, and understand, I argue that an insider action researcher is ideally positioned to contribute substantively to the strategy field. S/he is ideally positioned to generate insights on the praxis level that will allow the organization – and others – to develop new capabilities, i.e. develop “know-how that enables an organization to achieve its intended outcomes” (Coghlan & Shani, 2008). Know-how is directly linked with praxis – the how – whereas an assemblage of praxes make up a practice – the what, and the focus on knowledge at the moment of action is associated with practitioners – the who (Jarzabkowski & Spee, 2009, p. 70). I suggest that where the insider action researcher may contribute significantly to gaining insights in praxis, the ethnographer may contribute significantly to gaining insights in practice. Therefore, the insider action research perspective can be a valuable and novel supplement to the predominantly ethnographic perspective to strategy studies, particularly through theoretical contributions that are centered on incremental praxis-related insights that have practical usefulness. Indeed, the development of such know-how is a strategic necessity for organizations (Coghlan & Shani, 2008).

3.3 Summary

The data for this Industrial PhD project was collected primarily through conducting and evaluating one strategy formulation workshop in 2012 and ten strategy implementation workshops in 2016 at the diesel engine company, and secondarily in 2017 through dissemination to and evaluation by consultancies and conducting card sorting and labeling exercises with employees. In the 2012 strategy formulation workshop, I acted as a clinical process consultant (Schein, 1999) helping the purchasing department manager conduct a workshop that facilitated the department’s

joint formulation of their values, mission statement and vision. In the 2016 workshops, I had the role of the insider action researcher and was tasked with the execution of workshops with the Engineering Operation departments with the purpose of solving problems indicated in a recent employee engagement survey and ensuring alignment of action planning with a revised strategy. I engaged in a partnership with department managers of the Engineering Design department for the purpose of developing a rigorous yet versatile workshop design that could be used for the critical Operation workshops. Observations at a top management meeting and an interview with five managers of the Design departments and their senior manager served to emphasize the need for the workshops and validate the workshop design, respectively, but were not part of the analyses. During the action research dissemination, external strategy consultants argued in favor of a standalone narrative interview guide that can be used in workshops without the presence of a narrative facilitator. The standalone interview guide was developed based on two card sorting and labeling exercises with employees at the diesel engine company.

To maximize the rigor of this action research project, I have tried to describe the events that preceded the data collection in a precise and transparent manner. As is normal in action research, the events that preceded the respective workshops and the workshops themselves do not follow a carefully crafted case study protocol, but occurred as a result of the company's production schedule, as was the case for the dissemination to and evaluation by consultancies and card sorting and labeling exercises. Rather than reducing the rigor of the case study, I argue that this organizational anchoring increases the rigor of the study: this unstructured research project is symptomatic of how organizations operate and thus a portal to observe how knowledge is created through action as a strategy praxis. Additionally, I argue that

context-rich, meaningful and thick descriptions (Miles et al., 2014, p. 313) yielding insight into workshop praxis and organizational narrative interviewing praxis can only be generated through the taking of action: carefully planned workshops with the main purpose of studying strategizing praxis would be detached from a company's regular production schedule and would not emulate the employees' normal working style (Nomura, 2002, pp. 265–266) and therefore result in less valuable insights in praxis.

4. Empirical papers

4.1 Strategy development through interview technique from narrative therapy

The first article has been published as Kryger, A. (2017). Strategy development through interview technique from narrative therapy. *Journal of Organizational Change Management*, 30(1), 4–14. <http://doi.org/10.1108/JOCM-06-2016-0111>

Strategy development through interview technique from narrative therapy

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Abstract

Purpose The purpose of this paper is to demonstrate the successful strategy formulation process of a new purchasing department at an international engineering group.

Design/methodology/approach The strategy formulation was co-created by the department manager and employees at a storytelling workshop, facilitated with interview technique from narrative therapy, and later authorized by the business area director. The organizational intervention preceded the scholarly inquiry.

Findings Employees' retrospective storytelling about working at the company enabled them to formulate a joint mission statement using words and expressions from their own stories. Prospective storytelling enabled them to formulate a joint medium- and long-term vision and a corresponding action plan. This paper proposes interview technique from narrative therapy as a new practice-oriented strategic

management tool and calls for further experimentation in rethinking best practices in strategy development.

Originality/value Introducing narrative therapy interview technique in an organizational context is valuable because it may facilitate affinity of employees to strategy through storytelling thus contributing to contextualized strategy formulation and paving the way for subsequent implementation. This “from practice to research” approach can serve as inspiration for action researchers interested in driving organizational change.

Keywords strategy development, narrative therapy, interview technique, storytelling, co-creation, clinical inquiry

Paper type Research paper

Introduction

A business area of an international engineering group had had high market shares for a couple of decades and thus no one saw a particular need for explicating a strategy – “the products sold themselves.” In the wake of the financial crisis in the late 00’s, the business area found itself under pressure to maintain its market share and the need for an explicit strategy arose. The challenge facing the organization was how to translate strategy into something experience-near for the strategy-unaccustomed employees, with a view to facilitating their understanding of strategy. In early 2012, the department manager of a newly established department asked me, in my capacity as communications manager, if I could facilitate a workshop for the department to formulate a department strategy. The department had been established six months prior and had spent the first half year setting up a new system. The manager was

concerned that employees of the business area in question were not used to working with strategy. We jointly agreed to experiment with storytelling as facilitation technique during strategy development in order to incorporate employees' own stories in the department's strategy formulation – later other departments would follow.

In this paper I show that interview technique from narrative therapy can be used to facilitate the development of a department strategy built around the employees' own work stories. After recalling the recent history of efforts to use storytelling in strategy, I will outline my theoretical framework and describe the method, which is qualitative clinical inquiry in the form of an experimental storytelling workshop. The analysis uses the method of mapping narrative interviews, which allows visualization of the reflection levels the storyteller traverses during storytelling. Implications of transferring interview maps from psychology to organization concern time consumption, story aesthetics, and a focus on sharedness rather than individual sensemaking. On this basis, I conclude that storytelling facilitated by interview technique from narrative therapy bridges retrospective accounts of work events and prospective bets on the future, which can materialize into strategic targets in a transformative manner, i.e. generating agency. Thus, I emphasize the importance of storytelling experimentation and call attention to the value of a strategy-as-practice perspective in rethinking best practices in strategy development, which is underexplored compared to strategy implementation.

Storytelling technique from narrative therapy as a strategic management tool

Strategic management is about goal-setting, action-planning, and leading employees to perform those acts in order to achieve organizational growth. Strategy is often described to materialize in three stages: formulation, implementation, control, but the stages can be iterative and thus cater for emerging strategy (Mirabeau & Maguire, 2014). The strategy formulation often consists of mission statement, describing the organization's *raison d'être*; vision, describing the goals; and an action plan for how to reach the goals (Bart, 1997; Fenton & Langley, 2011; Gary Hamel, 2012). The strategy can be communicated to the organization through storytelling (Boje, 1991a), which is considered a strategic practice and a management tool, and stories help managers and employees deal with ambiguity, uncertainty, and confusion (Brown & Thompson, 2013). A strategy formulation with affinity to employee stories caters for a qualified implementation and one way of attaining such affinity is to involve employees in the strategy formulation process (Gary Hamel, 2012). One way to do so is to elicit employee stories in order to acquire a rich, nuanced understanding of organizational issues and to reflect on perceived problems and their resulting effect and influence on employee behavior (Barry, 1997).

By drawing on interview technique from narrative therapy (White, 2007; White & Epston, 1990), the elicitation of employee stories may give not only strategists and managers but also the employees telling their stories a deep, contextual, and particular understanding of organizational behavior. Conversely, thin stories (Cunliffe, 2010, p. 231) may take work activities at face value without penetrating the veneer of mere observation and gut feeling and thus lead to faulty conclusions about the relations and effects of an issue. The dialectic possibilities of narrative therapy in an organizational context to create deep understanding for strategists as well as employees has been described to open a "series of intriguing possibilities" (Barry,

1997, p. 35). In addition to solving problems through therapy under a coaching label (Barner & Higgins, 2007), narrative therapy has also been used for organizational development, where there is a purported gap between scholarly and practitioner pursuits (J. R. Austin & Bartunek, 2006, p. 309). At the organization referenced in this paper, applying narrative therapy technique in strategy development was anticipated to not only enable an experience-near strategy formulation, but also to facilitate employees' understanding of strategy.

In narrative therapy, it is a fundamental assumption that a problem is nested in a socially dominant story built around events that are perceived problematic (Polkinghorne, 2004, p. 60) and that people can story their experience in interaction with others to actively shape their lives and relationships (White & Epston, 1990, p. 13). An interviewer (in psychology: therapist) can facilitate the deconstruction of a problem to elucidate various relations and properties of the problem through storytelling (White, 2011). Narrative interview technique is instrumental in deconstructing the causal and temporal relations of the problem and the events at which it and its derivative effects become manifest (White, 2007) through tenets such as (1) influence mapping and (2) problem externalization (Barry, 1997, p. 33); (3) identifying unique outcomes (Barry, 1997, pp. 34–35), which is a process of identifying events where the problem and its effects were not present in order to facilitate performances of new meaning (White & Epston, 1990, p. 55); (4) audiencing (Barry, 1997, p. 35) where witnesses, i.e. listeners in the storytelling situation, contribute to the construction of the new, more complex plot (Polkinghorne, 2004, p. 60) by elaborating how the new plot resonates with their own experiences.

White (2007) suggests six “maps” to aid the interviewer navigate through six types of narrative conversations, all leading the storyteller through a sequence of reflection levels. Through the map metaphor, White signaled that in a narrative conversation, “we are embarking on a journey to a destination that cannot be precisely specified, and via routes that cannot be predetermined” (White, 2007, p. 4). In a process of sensemaking, “people seek to produce, negotiate, and sustain a shared sense of meaning” (Gephart, Topal, & Zhang, 2010, pp. 284–285) through embodied conversation, dialogue or other performance (Weick, 2012, p. 147). The last reflection level in narrative therapy, which is not always reached in a narrative conversation, is “plans for action” (White, 2007, pp. 278–9), where the storyteller considers possible future action that will minimize the influence of the identified problem. In storytelling terms, the storyteller makes “a bet on the future” by tentatively describing a possible future s/he may envisage – such conception of story conforms with the storytelling genre antenarrative (Boje, 2001, 2014). A technique that mobilizes and obtains such impetus for strategic change toward goals that have been described in an experience-near manner appears useful in strategy development, cf. goal-setting and action planning.

Table 1 shows three interview maps that may be particularly relevant to apply in a strategy context. (1) Externalizing conversations and (2) Conversations that highlight unique outcomes have the same generic structure, but whereas the former focuses on storytelling about a problem, the latter focuses on storytelling about a positive experience. Deep reflections about problems and challenges and their possible solutions lie at the heart of strategy (Mirabeau & Maguire, 2014, p. 1211). Through (3) Scaffolding conversations a storyteller can erect a scaffold from the present to a

desired future state through storytelling, and evaluating possible futures is also a key strategic process (Healey et al., 2015, p. 514).

Reflection level	Externalizing conversations	Conversations that highlight unique outcomes	Scaffolding conversations
1	Negotiating an experience-near and particular definition of the problem	Negotiating an experience-near and particular definition of the unique outcome or solution	Characterizing the unique outcome
2	Mapping the effects of the problem's activities	Mapping the effects and potential effects of the unique outcome or solution	Unique outcome taken into chain of association
3	Evaluating the effects of the problem's activities	Evaluating the effects of the unique outcome or solution	Reflections on chain of association, learnings and realizations
4	Justifying the evaluation	Justifying the evaluation	Abstraction of learnings and realizations, which may be followed by
5	(n/a)	(n/a)	Plans for action

Table 1. Structure of externalizing conversations, conversations that highlight unique outcomes, and scaffolding conversations according to White (2007, pp. 55, 249, 278–9).

Method

The business purpose of the workshop was to develop and formulate a department strategy whereas the scholarly purpose was to explore the possibility of using interview technique from narrative therapy to facilitate co-creation of strategy through storytelling (Briody, Pester, & Trotter, 2012, p. 81 cf. “co-production”). The experiment conforms with clinical inquiry/research: It was driven by the department manager’s agenda, she was highly involved in the process, and it had a high level of researcher involvement and facilitation (Schein, 1995, 2008, pp. 268, 273). However, being qualitative research, it does not provide a generic, generalizable account of strategy formulation or process (Yin, 2013). During the workshop, the employee stories were used as reference point to start and continuously enhance the strategy formulation through a number of iterations until the employees were satisfied with the formulation, i.e. the co-creative generative formulation of strategy was sensitive towards patterns across stories (Eisenhardt & Graebner, 2007). The department manager concurrently listened, contributed, and authorized the emerging strategy formulation (Mirabeau & Maguire, 2014). Closure came in the form of a strategy text (Fenton & Langley, 2011) describing mission, vision and corresponding action plan, formulated and signed off by all participants, which was subsequently submitted for approval to the business area director, the superior of the department manager.

It has been suggested that organizational proximity can yield a nuanced understanding of micro-level strategy processes due to the inherent trust and power vested in the role of facilitator cum inside action researcher (Boje, 1991b, p. 125; Kaplan, 2008, p. 746; Roth et al., 2011; Samra-Fredericks, 2003, p. 168). Considerations concerning the interviewer’s position of power and the resulting possibilities of pulling the dialogue in a certain direction must be considered at any

storytelling-based endeavor (Hawkins & Saleem, 2012, p. 211). The role of the interviewer in narrative therapy has been compared to being a host (Aman, 2006, p. 4): “Treating someone as a cherished guest addresses the power differential undisputable in a therapeutic relationship by elevating the status of the person who comes to consult the therapist.” Similarly, Gabriel (2000) compares the role of the interviewer, who facilitates storytelling, to that of the fellow-traveler. During the strategy workshop, as facilitator I “expressly sought to avoid supporting any particular account or interest” (Küpers, Mantere, & Statler, 2012, p. 89) and sought to ensure that all formulations of strategy were directly related to the employees’ own stories, using their terminology. My role was to facilitate stories, nurture participation, stimulate retrospective and prospective reflection, listen for diverse points of view and explicate the polyphony to cater for dialogic understanding (Barry & Elmes, 1997, p. 444).

At the workshop, the employees would sit in the interviewee chair one by one and when not telling their stories, they would sit at an adjacent table, listen to their colleague, and act as audience and outsider witnesses (White, 2011). Storytelling can be regarded as a performance with an audience (Barry, 1997, p. 35; Czarniawska, 2004). Audiencing can be done during or usually at the end of the conversation by a witness group who may acknowledge resonance and transport (White, 2005), i.e. how the unfolding story resonates with them for example by using a metaphor, which was the case in the reported workshop. Use of metaphor in organizations can facilitate “compact descriptions of complex phenomena” (Weick, 1989, p. 529), and during audiencing, a storyteller’s newly formulated, complex plot can be ‘thickened’ by a metaphor, which describes the new meaning which the storyteller just produced through the act of storytelling, cf. ‘translocutionarity’: “I do not know what I mean

until I hear what I am saying” (Kirkeby, 2016, p. 682). Thus metaphor may facilitate generation of new meaning for the storyteller. After each employee’s storytelling, the audience could offer their audiencing to the storyteller, however not all stories resonated with the participants. The phenomenon that employees ask “how do I fit into the story” (Weick, 2012, p. 148) and sometimes find that they do not, may have implications for strategy development: Which stories should then be selected to exemplify and contextualize the strategy? While this paper points to tension between organizational story diversity and standardization, it does not yield a prescriptive answer, but rather calls for further research.

Analysis

The storytelling experiment started with each employee telling a story about their work life one by one. A mix of interview maps (White, 2007) were used. The following example shows how progression from reflection level to the next depends on how the story develops. Reflection level 5, where the storyteller may envisage possible future actions, was not always reached. The interview sample below had duration of about 10 minutes; below it is referenced based on flipchart notes, i.e. not quoting the spoken word verbatim, because no recording was made of the strategy workshop. The interview below is indicative of how an event can be ‘thickened’ by making the event experience-near. When the interviewer senses that the storyteller is ready to progress to the next reflection level, s/he can proceed and ask a question that invites the storyteller to go to the next level. Although not evident in this example, the interviewer or the storyteller can decide to ascend or descend reflection levels (the storyteller will not be aware of transitions) – the progression is not always linear from lower reflection levels to higher; the interview parties can jump back and forth. All quotes from the workshop are translated from Danish by the author.

Question 1 (reflection level 1: negotiating an experience-near and particular definition of the problem): What would you like to talk about?

Answer 1: About the teaching session yesterday at the Center. It was a teaching session with a high degree of worry because the employees at the Center found it difficult to understand why they needed to use the purchasing system and how it works. Normally, we only teach 6-8 people at a time, but here the entire staff of the Center participated, so in total 16. It means that we need to be more serious than we usually are, so we agreed on that before we started. The network did not work on the laptop. We need internet connection when we teach the purchasing system, so it was unfortunate, but we managed to get it up and running finally [by doing the teaching from a chair in the corner of the room, close to a wall switch].

Q2: So how did it go?

A2: The students were difficult which means they tested the system through questions and asked a lot of “what ifs”.

Q3: How would you describe yesterday’s session?

A3: Challenging. Which means fun.

Q4: So something that is challenging is also fun?

A4: Yeah because it is difficult to challenge people like us.

Q5: So what would you call this thing you are good at?

A5: I answer honestly.

Q6: So your colleague, you and Honesty³ finished the teaching. How did you feel?

³ The adverb “honestly” in Answer 5 was referred to as the externalized entity “Honesty” in Q6 (cf. externalizing practice White, 2007, p. 9f)

A6: I felt well when I left.

Q7 (reflection level 2: mapping the effects of the problem's activities): So what came out of the teaching session?

A7: They got an idea that it probably is not so bad. There have been many stories and rumors about what was really going to happen and how many old systems would be replaced by the new purchasing system, but they were calmed down.

Q8: What came out of the teaching for you?

A8: I gained even more experience tackling this type of people.

Q9 (reflection level 3: evaluating the effects of the problem's activities):

What do you think about that?

A9: It is positive when we see that the purchasing system is used, that it proves successful.

Q10 (reflection level 4: justifying the evaluation): ...because what is important for you?

A10: I am happy when I deliver what I am good at.

Q11: Are there other things that are important?

A11: Yeah I become proud. I try to be trustworthy [Danish: troværdig].

Such a story conforms with the storytelling genre 'living story' which is defined as having "plot and characters, generating emotion in narrator and audience" (Gabriel, 2000, p. 239), representing "facts-as-experience for both tellers and listeners" (Gabriel, 2000, p. 27). Further, the story centered around two predicaments and how the storyteller handled them, i.e. the particularly difficult students, and the lack of internet connection – both of which were overcome. Such "*conflicts, predicaments, trials, coincidences, and crises that call for choices, decisions, actions, and*

interactions” are referred to as the organizational appearances of living story (Gabriel, 2000, p. 239 original emphasis). Considered a translocutionary endeavor, the story also has antenarrative elements and the interview is the conception of the antenarrative where story emerges (Boje, 2008, p. 239). The translocutionarity inherent in an interview facilitated by interview technique from narrative therapy emphasizes that story conception is here and now, in the moment of narration (Boje, 2014, p. 5) where the interviewer facilitates reflections and perhaps new meaning for the storyteller. Particularly the switches between reflection levels led to pace changes in the interview, where the storyteller had to stop narration and think before being able to answer.

The story is an example of the work that is being done by the department staff, and it resonated with one of the colleagues who started by reading out the words she particularly noticed during the story, e.g. “finding solutions” and how that was challenging and fun, “the notion that they [the students/colleagues] are difficult.” She offered a metaphor of a ship with thunder and lightning on one side and quiet waters and sun on the other. What resonated in her own work life was that “they [the students/colleagues] were people like us, and we are different. The purchasing system is the same whether you are wearing a suit, shirt and tie or a boiler suit.” The statement “they were people like us” may refer to an expectation of hostility in teaching situations due to general dislike of the purchasing system in the company. There was no transport for the colleague who acted as witness although she enjoyed being reminded about the quotes that resonated with her. Returning to the storyteller, he reported that it was “ok” to hear the audiencing and he was reminded of what he called “the expectation’s surprise: You think something or worry about something, but it turns out that it goes smoothly.”

After storytelling by all department members, I asked them to underline on the flipcharts with story notes the words they thought were most important. To each underlined word, they answered the question “why is this important?,” corresponding to reflection level four (cf. White, 2007), five times in order to stimulate rich reflections on the importance of the preferred notions (Collins & Porras, 2005, p. 226). All statements were documented on flipcharts. The employees then underlined the components of the mission statement on the flipcharts, i.e. their core competences, business area, desired public image, and technological area, respectively. This enabled a discussion of the mission statement which resulted in the formulation seen below. During the discussion, the colleagues had affinity with the words, phrases, notions used because they were derived from their own stories and reflections, and they recalled the background of each word – they could also trace back the words to the exact story when it was first used, thus contextualizing the discussion. This corresponds with the “experience-near and particular definition of the problem” that White cited as foundational for narrative conversations (White, 2007, p. 55), and which the department manager stated an explicit wish going into the workshop.

Mission statement: We give visible support and training in [the purchasing system] and hereby make the [purchasing directive] known in [company] based on a principle that the employees should spend as little time as possible on the system, which has to be user-friendly. We work in a positive and professional manner both towards suppliers and employees, so we are known as reliable and trustworthy. We stand for transparency and speed, and we make it possible to extract correct reports. By ensuring that employees with authority to sign documents know and use [the purchasing system] we ensure compliance with

[the purchasing directive], realize quality and savings, and we help reach job satisfaction, future employment and ultimately a profitable company.
(underlined words cited directly from the flipcharts)

Formulation of vision and corresponding action plan was then a matter of “prospective sense-shaping of the future in an open-ended process of becoming” (Svane & Boje, 2015, p. 26) where the employees would reflect on their most ambitious possible future actions with reference to the mission statement. The discussion particularly concerned the notion stretch goals (Bart, 1997): It was easy for the employees to suggest possible future actions in the immediate future, but it became more difficult as the planning horizon was stretched to five and ten years (see the vision below). The prospective sense-shaping process involved describing a possible future state and its requirements. For example, the requirements for the successful realization of the first strategic target included “a well-implemented purchasing system” and “compliance with the purchasing directive.” The employees continued to state that realizing the two requirements was important because “it could lead to timely payment to all suppliers”.

Vision:

1. Spend on [sub area] purchasing of 95% in 2017 through [the purchasing system].
2. Cover all customers’ individual need for purchasing reports at [the company] in 2017.
3. Be the benchmark global sparring partner concerning [sub area] purchasing in the [Group] in 2022.

Where the strategy development workshop had focused on asking ‘why’ so far, we turned to asking ‘how’ to formulate an action plan: How would the vision be realized in five to ten years, what actions could the purchasing department staff take to reach the strategic targets, corresponding to reflection level five (cf. White, 2007) as well as with antenarrative bets on the future: “The antenarratives constitute a range of possibilities, not fully determined futures, which an Observer Effect can collapse into a particular course of planned action” (Boje, 2014, p. 41). In the case of the purchasing department’s strategy workshop, this observer effect corresponds with the effects of the interview technique. The interviews conducted at the workshop can thus be labelled ‘transformative’ because they enabled the formulation of a particular course of planned action through storytelling – the storytellers conceived future action thus transforming the future (Boje, 1991a, p. 8, 2014, p. xxi, 10, 112; Brown & Thompson, 2013, p. 1147). The future action planning materialized in a list of actions, each with a designated owner and a deadline, and the alignment of the action plan concluded the workshop day.

After the strategy workshop, the goals of the department strategy as a whole became the performance indicators of the department manager, whereas the actions became performance indicators for the respective employees. All actions and corresponding goals were formally delegated and subsequently followed up at yearly appraisal talks. The department manager initiated so-called MVA (Mission-Vision-Action) meetings where daily operations of the department were related to the mission statement, strategic targets and actions. Further, the department manager brought the strategy formulation to all future job interviews to show applicants how the department worked actively with refining their strategy. Although this clinical inquiry is qualitative, some numbers are in place: The internal satisfaction survey three years

after the workshop showed that the purchasing department's employees' general job satisfaction was 11.7 index points above the average for the location; teamwork satisfaction was 15.3 index points above average; direct supervisor satisfaction was index 100 (maximum score). Open evaluations on email from the employees in the days following the workshop were positive and revolved around being heard, e.g. "I felt you were with us all along and understood our problems and motives," and that the employees could see themselves in the resulting strategy, e.g. "everyone brought their ideas and thoughts to the table." Although causality between strategy affinity and employee satisfaction is illusive (Richmond, McCroskey, & Davis, 1986), I suggest correlation.

Implications

A methodological implication of using interview technique from narrative therapy in an organizational context is that interviews in an organizational context can be done quicker than in a therapeutic context where more time can be spent exploring events. A quick interview pace invariably will lead to less well-described events and may impede the possibilities of generation of new meaning and transport. Although syncopated living stories and antenarratives (Adorisio, 2008, p. 620 cf. "rough stories") from such an interview may have "doubtful aesthetic or political value" (Czarniawska, 2004, p. 40), I contest that they "can hardly be of practical use for a problem at hand" (Czarniawska, 2004, p. 40) and argue the opposite. In this experiment, living story and antenarrative were found to be instrumental in the development of a strategy formulation. An implication of this clinical inquiry is that such experimentation does not have to be a highly time-consuming practice, but rather implies that useful reflections can arise from briefer interviews.

Managing “change is less about directing and controlling and more about facilitating recipient sensemaking processes to achieve an alignment of interpretation” (Balogun & Johnson, 2005, p. 1596), and I would argue that the result of the storytelling/strategy development workshop can be described as ‘alignment of interpretation’ – not in a mechanistic sender-recipient relationship, but rather within a community of shared understanding; a sharedness of stories. Sensemaking literature describes achieving this kind of sharedness of interpretation of stories as a distributed process where individuals holding “different pieces of information are able to collectively construct new meaning” (Maitlis & Christianson, 2014, p. 102). The sharedness of stories runs counter to the ideology of narrative therapy which is always about the individual and his/her development, but in a strategy development context I posit that sharedness of stories can lead to an experience-near and contextualized understanding of strategy.

Further research that combines interview technique from narrative therapy and strategy development with subsequent implementation is called for in order to better understand the dialectic between storytelling and strategy as well as the dialectic between strategy formulation and implementation. Storytelling can be a strategy practice where strategy is communicated through story, but I posit more than that. A ‘strategy-as-story’ ontology has been suggested (Barry & Elmes, 1997, p. 446), although there is a scholarly discussion how “the value of narrative theory as a ‘strategy-as-story’ perspective has more to offer about strategy implementation processes than about strategy formulation processes” (Ireland & Hitt, 1997, p. 845). The main argument of the critique of strategy-as-story is that implementation stories are “much richer compared to formulation stories” (Ireland & Hitt, 1997, p. 845). According to this clinical inquiry, rich stories can occur during strategy formulation

too, thus an implication is that storytelling practice in strategy *formulation* processes may enhance strategy implementation processes in a strategy-as-story perspective.

Conclusion

Interview technique from narrative therapy can be used to facilitate the development of a department strategy built around the employees' own work stories. This is particularly valuable to organizations that need to familiarize employees with strategy and that have a loosely formulated strategy framework, leaving room for strategy formulation on department level. Interview maps from narrative therapy can be used one-to-one in an organizational context; however, interview length may be reduced, in effect reducing time for reflection compared to a psychological context. The reflection levels from narrative therapy can be traversed in short time in an organizational context, compared to a psychological context. A relative short duration, however, does not confine or block reflection. Stories and associated antenarrative bets on the future can materialize into personal agency which can be amplified through audiencing where an audience shares with the storyteller how the story resonated in their own life. Through reciprocal reflection (Brown, Humphreys, & Gurney, 2005, p. 320), a department's mission statement, vision, and a corresponding action plan can be co-creatively formulated by the staff themselves, resulting in affinity with strategy.

Scholarly as well as organizational attention may be well-invested in understanding the possible effects of transformative interviews as business strategy facilitation tool. Such attention may further qualify strategy development and implementation in an organizational perspective as well as contribute to establishing a better understanding of how storytelling can be transformative and generate agency. Two major

organizational concerns may be foreseen in connection with using interview technique from narrative therapy for strategy facilitation: First, can narrative strategy facilitation be scaled up to organizational level: How can systematic facilitation of an overall strategy, in search for affinity and qualified implementation, be aligned throughout the organization? Second, the feasibility of involving employees in strategy development may be culturally and organizationally dependent and needs to be explored through research and practical experimentation. Whereas the data for this paper was a single workshop, future research could possibly be multi-case studies or multi-company studies of comparable storytelling-facilitated workshops for additional rigor. Such future research may cast light on the organizational potential of transferring transformative interview technique from the psychological realm to the organizational realm; this clinical inquiry suggests such an endeavor may enrich both academia and strategy practice.

4.2 Iterative prototyping of strategy implementation workshop design

The second article was accepted on 17 November 2017 and is under publication in the Journal of Strategy and Management.

Reference: Kryger, A. (2018). Iterative prototyping of strategy implementation workshop design. *Journal of Strategy and Management*, 11(2), pp. 166-183. <https://doi.org/10.1108/JSMA-07-2017-0051>

Iterative prototyping of strategy implementation workshop design

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Abstract

Purpose: The purpose of this study is to demonstrate how a strategy implementation workshop design can be developed and tested while minimizing the time spent on developing the design.

Design/methodology/approach: This multiple case study at a diesel engine company shows how iterative prototyping can be used to structure the design process of a strategy implementation workshop.

Findings: Strategy implementation workshop design can be developed in resource-constrained environments through iterative prototyping of the workshop design. Each workshop iteration can generate value in its own right and at the same time the workshop design can be optimized until the final, most effective, design is found which can then be rolled out.

Research limitations/implications: In a strategy-as-practice perspective, this study shows how scholarly attention to micro-level strategy praxis at a company can be enlightening to strategy consultants who need to conduct strategy implementation workshops.

Practical implications: By selecting an iterative modular workshop design, the strategy consultant has at his/her disposal a strategy tool that is easily adaptable to organizational practice and one for which s/he can draw on his/her experience as well as add to his/her knowledge base.

Originality/value: Introducing iterative prototyping in an organizational context can facilitate fast yet structured development of a rigorous workshop design. Strategy consultants are provided with empirical examples of how an iterative prototyping process can be structured across multiple workshops.

1. Introduction

This paper analyzes iterations of design of strategy workshops, which are a common practice in organizations (Healey et al., 2015, p. 507). The paper answers the call to examine “how basic design features relate to workshop outcomes” (Healey *et al.*, 2015, p. 508; see also Jarzabkowski and Spee, 2009). The practical challenge for organizations is how to develop and test a workshop design while minimizing the time spent on the development phase prior to the intervention (Coghlan & Shani, 2005, p. 534). This study presents an iterative, modular approach to workshop design where a number of workshop modules can be added and removed depending on the organizational task at hand. It offers an approach to designing strategy implementation workshops that is low risk in terms of time and resources. A series of workshop design iterations at a diesel engine company, that urgently needed complex organizational problems to be solved while ensuring that the solutions were aligned with strategy, provide the empirical setting for addressing the research question: how can strategy implementation workshop design be developed in resource-constrained environments?

At the diesel engine company, it was formerly normal practice to conduct strategy workshops with whole departments when strategy was to be implemented. Former workshop designs were thought out by strategy consultants, introduced to managers at a briefing and the managers were then expected to carry out the workshops with their employees. Reviews of the workshops and their output, however, showed that although some managers carried out the workshops as intended by the strategy consultants, some did not (at all) and some changed the concept to match their own department's needs. This study concerns a point in time where problem-solving and strategy alignment was urgent to top management and therefore effort was put into empirically testing the workshop design before rolling out the final design by passing it on to the managers. This study zooms in on the pre-implementation period where the strategy was developed, but had not yet been communicated to employees, where evaluations of four workshop iterations led to an optimization of the workshop design which could then be rolled out to employees when strategy implementation started immediately after. Unlike former workshop series, this workshop series was not thought into being, but spoken into being through iterative practice.

The paper is structured as follows: a literature review will show that little research has described the pre-implementation phase of a strategy implementation workshop series where the workshop design is developed to match the organizational objectives. The concept of iterative prototyping will be introduced to describe a design approach that revolves around iteratively testing workshop modules in practice until an optimum design vis-à-vis the organizational objectives is reached. After a description of the method, which is a single company multiple case study conducted by an insider action researcher, the findings will describe four workshop iterations at the diesel engine company that led to the definition of the final workshop

design. The findings will also describe the micro processes of the workshop modules that were tested in the four iterations to contribute to the knowledge pool of strategy practices and thus serve to inform practitioners and scholars alike. The discussion will address the contribution of iterative prototyping in workshop design, and the paper concludes that strategy implementation workshop design can be developed in resource-constrained environments through iterative prototyping.

2. Zooming in on the pre-implementation design phase of strategy implementation workshops

This literature review of strategy workshop studies in a design perspective will emphasize three problematic features of previous studies: first, they have focused on participants' conduct at and following the workshop as opposed to the pre-workshop phase where the workshop is planned; second, they have focused on workshops with a duration of one or more days as opposed to shorter workshops; and third, they have focused on strategy development or review as opposed to implementation. Through a focused reading of design literature, I will compare the pre-workshop design phase to iterative prototyping and further develop this concept in a strategy implementation workshop context to address the empirical gap concerning the development phase of short workshops with the objective of implementing strategy.

Strategy is a continuous evolutionary process (Pugh & Bourgeois, 2011, p. 172) that enables long-term planning of resources in a business context. In the empirical context of the diesel engine company, the strategy process was managed by the author as in-house strategy consultant. Strategy workshops are an important type of strategic episode (Hendry & Seidl, 2003) because they “provide a rare opportunity to suspend normal structures to reflect on current policies and engage in new strategic

conversations” (Healey et al., 2015, p. 508). Strategic episodes are characterized by three notions: *initiation* where the participants decouple themselves from everyday work, *conduct* which deals with the activities of a particular episode, and *termination* where everyday work is resumed (Jarzabkowski & Seidl, 2008, p. 1395): by allowing participants to step out of everyday work, strategy workshops allow them to reflect on their normal practices, to see these practices in new contexts and to propose change. After completion of a strategy workshop, transfer of plans made at the workshop to the wider organization is important to enable strategic change (MacIntosh, MacLean, & Seidl, 2010, p. 304). Participants at strategy workshops, which mostly take place over two to four days (Hodgkinson, Whittington, Johnson, & Schwarz, 2006, p. 483), are predominantly senior managers and executives (p. 487), and the prevalent objective of a workshop is strategy development (p. 483). However, their design can be twisted and turned to match particular organizational contexts (Paroutis, Franco, & Papadopoulos, 2015, p. 49). Strategy workshops are often facilitated by internal or external strategy consultants (Gherardi & Perrotta, 2014, p. 135; Knott, 2008, p. 26).

Empirical studies of strategy workshops have focused on conduct at workshops and on the organizational effects that resulted from the workshop, respectively:

First, ten publications zoom in on conduct at the strategy workshop or meeting: two studies using LEGO bricks as tool to facilitate participants’ reflection on their organization in an effort to design strategy showed that workshops involving the material co-construction, deconstruction and reconstruction of LEGO structures had a positive effect on the desired outcome to develop strategy at a telecommunications company and at four Danish companies, respectively (Bürge et al., 2005; Roos et al., 2004). A study of 51 strategy meetings within three universities showed that the three

micro flows - emergence, maintenance/development, and selection/de-selection - imply a stabilizing or destabilizing of strategic orientations (Jarzabkowski & Seidl, 2008). A conduct-focused study of strategy making at a business division of a multinational mechanical engineering company showed that strategy workshops can be an integral part of a company's strategy process, but that opposition to and rejection of participation at the strategy workshops can constrain strategy making (Schwarz, 2009) – although the study makes recommendations for workshop planning practice, it does not analyze pre-workshop planning, it only observes the execution of strategy workshops. Similarly, a study of discursive strategies showed that “the egalitarian leadership style increases the likelihood of achieving a durable consensus” (Wodak, Kwon, & Clarke, 2011, p. 593), that five discursive strategies – re/defining, equalizing, simplifying, legitimating, and reconciling – can be used to “develop shared views around strategic issues” (Kwon, Clarke, & Wodak, 2014, p. 265), and that naturally occurring talk at such a meeting can be an important venue for strategizing (Clarke, Kwon, & Wodak, 2012). An ethnographic study of discourse at top team meetings identified team relational dynamics as a mechanism that links emotional dynamics and strategizing processes (Liu & Maitlis, 2014). From a quantitative perspective, a study of managerial experience at strategy workshops showed that strategy workshops are important for formal strategy emergence (Hodgkinson et al., 2006). Similarly, another quantitative study describes factors that may influence the successful execution of strategy workshops based on a survey with 639 managers, e.g. first, that workshops with the objective to resolve urgent issues are perceived less successful compared to workshops that are part of the company's normal planning cycle; second, that the duration of a workshop is not correlated with its perceived success; third, that a large number of workshop participants have a negative correlation with perceived successfulness of a strategy development

workshop whereas the number of participants has no effect on the perceived successfulness of strategy implementation workshops (van Aaken, Koob, Rost, & Seidl, 2013 who reject six other interesting hypotheses).

Second, two publications focus on conduct at the workshop as well as the outcome of the workshop: a hotel group, a defense services business, an oil services business, and a non-governmental organization all wanted to change their strategy due to recent changes in the business environment of the respective organizations (Johnson, Prashantham, Floyd, & Bourque, 2010). The study found that theories of rituals and ritualization were useful in understanding the dynamics and outcomes of strategy workshops (see also Bourque & Johnson, 2009): first, the success of the workshops to achieve their purposes within the workshops themselves depended on the emotional energy and commitment of the participants which benefited from a clear workshop process that the authority (CEO/manager) abided by and that the participants perceived as legitimate means to achieve the workshop purpose. Second, freeing participants from hierarchical norms was found to stimulate qualified questioning and challenging which was identified as an enabler of successful workshops; it could be achieved when the authority relaxed norms and endorsed the legitimacy of the workshop process and the specialist/facilitator.

Third, two publications look at the outcome of strategy workshops: a post-workshop focused study of one-off as well as series of strategy workshops at ten UK-based organizations, showed that three notions were associated with bringing about strategic change at the respective organizations: the participants' perceived momentum at the workshops; an organizationally appropriate frequency – not too frequent, not too infrequent; and high seniority of participants (MacIntosh et al., 2010). Through a post-workshop focus, organizational, interpersonal and cognitive

outcomes were discovered as the main effect of strategy workshops in “a large-scale field survey of over 650 workshops conducted across a range of settings” (Healey et al., 2015).

In summary, previous studies of strategy workshops share three features: First, all focus on participants’ and facilitators’ conduct at the workshop or the organizational effects following the workshop(s). No scholarly account has been made of how a strategy implementation workshop design was developed to meet the organizational requirements. Second, all previous studies focus on strategy workshops with a duration of one or more days. No account has been made of short workshops of 2-3 hours, although strategy meetings, presumably of a couple of hours’ duration, have been studied and meeting structures that stabilized or destabilized an organization’s strategic orientation were described (Jarzabkowski & Seidl, 2008). Third, all previous studies explore strategy development or strategy review. No account has been made of strategy workshops as strategic episodes in connection with strategy implementation which is the point in time where the employees are introduced to a new strategy which is a crucial strategy process step (Ranjbar, Shirazi, & Blooki, 2014 see also Fig.1). A likely cause is that implementation practice is not perceived as strategy practice: “capturing the contributions of non-managerial staff to strategy work and the development of realized strategy does not easily lend itself to study as they are not present in the events, occasions or locations typically associated with and studied in relation to strategic work, such as senior team meetings or strategy away days” (Balogun, Best, & Lê, 2015, p. 1286). This scholarly perception may have led to the absence of implementation practice in the strategy workshop research agenda, e.g. in Seidl & Guérard (2015). With this study, I aim to contribute to research on

strategy workshop practice with an implementation perspective which is currently under-represented.

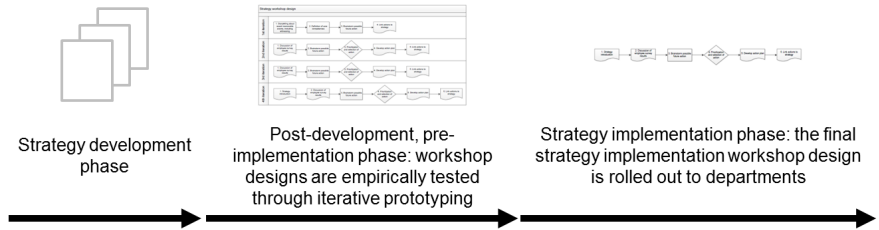


Fig. 1. Iterative prototyping of strategy implementation workshop design can be done after the strategy development is finished, prior to strategy implementation in the organization.

Fig. 1 shows that first a strategy is developed and prepared to be communicated to the employees. Second, the strategy will conventionally be communicated to employees at various organizational levels through the relevant channels. However, instead of proceeding directly to communication once the strategy has been developed, I wanted to investigate if the basis for strategy implementation could be improved through iterative prototyping of workshop design in what I would label the strategy post-development, pre-implementation phase. In this phase, a small number of departments and their employees provide the testing ground for developing an optimal strategy implementation workshop design which could facilitate the actual launch of the strategy when it is formally rolled out to the entire organization. The implication of doing iterative prototyping in the strategy post-development, pre-implementation phase is that, in this case study, employees of four departments were introduced to the strategy 12 days prior to all other employees, which was the time we spent on the prototype workshop design. At the diesel engine company, the in-

house strategy consultant facilitated the iterative prototyping workshops in the strategy post-development, pre-implementation phase and then handed over the final workshop design to the department managers who then facilitated the strategy implementation workshops for their own departments in the implementation phase.

A prototyping iteration has four steps: “envisioning possibilities, creating a prototype to embody a possibility, getting feedback about the prototype, and reevaluating constraints” (Dow et al., 2011). The prototyping process enables developers to repeatedly “try[ing] ideas and getting feedback” (Dow et al., 2011). The desired result of the design process is defined through dialogue about the organizational requirements for the process combined with the practical possibilities. The possibilities consist of the strategy consultant’s and the manager’s experience as well as possible future experiments that have yet to be conducted. The knowledge that the strategy consultant produces while designing the contextual tool is thus “a byproduct of helping rather than a primary goal” (Schein, 2008, p. 266) and a “research implication of an experimental approach is that workshop data will vary because the workshop design is dynamic” (Welch & Piekkari, 2011, p. 744). For the strategy consultant, experience leads to mastering the technique and in addition to designing a workshop that meets the organizational objectives, they learn something from each design that they can carry into their next design (Ericsson et al., 2006).

However, time constraints and resource consumption in terms of work hours for conducting multiple prototyping iterations in organizations can lead to focus on using what is theoretically thought of as the best design as opposed to conducting empirical iterations where the design is put to the test (R. D. Austin & Devin, 2003; Salas & Huxley, 2014; Schrage, 2013). Design of a strategy implementation workshop requires time to conduct each additional iteration and because of the direct bottom-

line effect of time consumption in connection with prototyping, organizations often avoid it “because they believe the cost/investment will be significant and the return will be minimal” (Dow et al., 2011). Additionally, it can be a challenge for strategy consultants to argue that the best workshop design can be developed through a number of sub-optimal iterations because what top manager will settle for anything sub-optimal?

The strategic decision to conduct iterations that may lead to an optimal design versus selecting a poorer, but standard, design in the face of increased expenditure is an essential question that any manager must ask him-/herself. In an organization, top management may order a strategy implementation tool, but it often affects employees, not top managers per se. Ultimately, strategy implementation tools are means to achieve certain desired ends, but the process of achieving those ends often involve the employees rather than top managers. Therefore, organizational prototyping can be said to be sponsored by top management for the benefit of the employees who will, if the iterations are successful, experience a better strategy process. That effect can be translated into a more effective strategy tool. The remainder of this paper reports on the iterative prototyping of a strategy workshop design where added resource consumption in the form of multiple iterations to achieve an optimal strategy implementation workshop design was consciously selected by top managers. Each design iteration should add value in its own right while the iterations as a whole should maximize the effect of the strategy workshop before the workshop design was fixed and serialized at subsequent workshops.

In summary, I suggest that studying the development process of strategy workshops that aim at implementing strategy, prior to the actual strategy launch, can further the strategy as practice research agenda while being practically informative to strategy

consultants. With this study, I propose the concept of iterative prototyping as method to design a strategy workshop that matches a particular organization for the benefit of employees as well as managers.

3. Method

Developing robust, actionable knowledge about the process of change while changing the organization is not only a distinctive characteristic in action research (Coghlan, 2011a), it supports the strategy as practice field's research objective to enhance strategy praxis and practice and develop highly skilled practitioners (Whittington, 2006, p. 629). Action research is in its widest sense a partnership between a researcher and one or more practitioners that seeks to create actionable knowledge in order to learn from it and disseminate the learning (Huang, 2010). The research and practitioner roles can, however, be centered in the same person: the insider action researcher, who conducts research inside the organization where s/he is permanently employed (Roth et al., 2011). An insider action researcher needs to manage the contrast between the roles as organizational member and researcher to generate actionable knowledge (Coghlan, 2011a, p. 71). An insider action researcher's proximity to organizational processes and the possibility to stand back and reflect, learn and disseminate give him/her an ideal position to generate strategically necessary know-how (Coghlan & Shani, 2008) that can further develop strategy praxis, practice and practitioners.

In this multiple-case study, top management at a diesel engine company decided to conduct a series of strategy workshops with participation of a department manager and his/her employees to implement strategy (Ranjbar et al., 2014). The term 'workshop series' does not refer to a sequential number of workshops with the same

participants where a common understanding is developed over time (e.g. as reported by Schwarz, 2009), but to a fixed workshop design that is applied in different departments with the same purpose. The company was unaccustomed to working with strategy because it had been highly successful within its product niche, a particular type of marine diesel engines, for two decades. As a reaction to the global financial crisis in the late 00's and its delayed effects in international shipbuilding and trade, the company needed a strategy, but the organization was challenged because staff at various levels had worked very little with strategy in the past decades. Top management therefore decided that the organization needed strategic sensitization to facilitate the implementation of the new top-down strategy. The sensitization should ensure alignment of action planning and execution with the new strategy (Macpherson & Antonacopoulou, 2013, pp. 267–268). The actions that needed planning were solutions to organizational problems that the departments faced that had been building up in a kind of stasis during the successful years. This bottom-up sensitization measure should complement the top-down strategy that was being cascaded down the hierarchy through other channels – however, only the strategy workshops are in focus in this paper.

Four department managers of engineering design and operation, respectively, volunteered for iterative prototyping of the emerging workshop design – in fact the workshop design process was not that different from the engine component design process they were used to. The first four managers and their employees gave me feedback that I used to modify the workshop design to a point where it effectively solved organizational problems while at the same time ensured that the action planning of solutions was aligned with the strategy. The workshop design tested in the fourth and final workshop iteration would continue to be used unaltered for the

remainder of the workshop series at the company, currently comprising more than 25 workshops in 2016 and more than double that planned in 2017. The challenge of conducting sub-optimal workshops, four in this case, until the final design was found was dealt with through framing of the study as a project that would ultimately benefit and be tailored to the organization. In the case of the diesel company, the managers agreed to this premise and were enthusiastic about being part of a structured development process of something non-product related, which was not normal practice at the company.

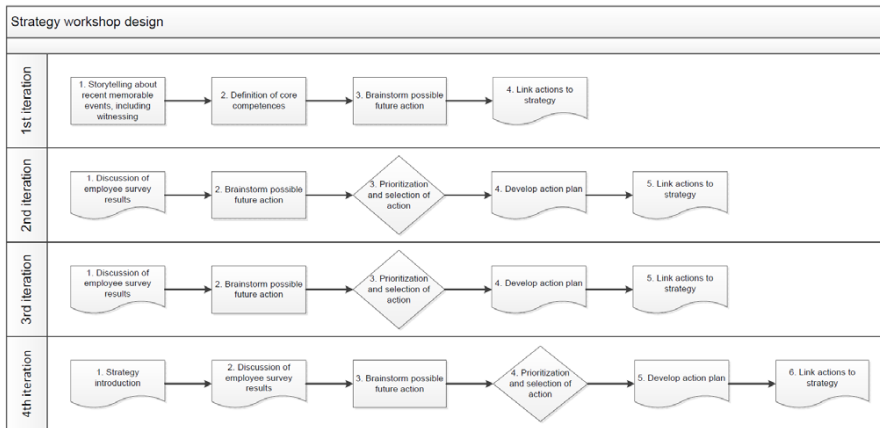


Figure 2. Prototyping iterations of the strategy implementation workshop design. All workshops had a duration of 150-180 minutes and five or six participants. The composition of modules changed from iteration to iteration except from iterations 2 to 3 where the type of department changed instead of the module composition.

The frequency of and time between the workshops were planned according to the departments’ production schedule, and the department managers selected a date and time when most employees could participate in the workshops. The four workshop

design iterations were conducted in 2016 on 7 September, 8 September, 14 September, and 15 September, respectively; the first, second, and fourth with engineering design departments and the third with an engineering operation department. Sound recordings were made at the workshops, and although they were not part of the decision making or design process which rested solely on evaluation by the managers, participants, me as facilitator of the workshops and my fellow researchers, they enabled transcription of the workshops (in NVivo, totaling 155 pages), which was later analyzed and is summarized in the Findings section below to demonstrate the micro processes at some of the workshop modules.

The strategy workshop design consisted of several workshop module combinations. The modules were introduced based on empirical research on strategy, notably interview technique from narrative therapy which had been used successfully at previous workshops at the company (Kryger, 2017). The strategy workshop design was changed through small-scale increments (Bamford & Forrester, 2003, p. 557) from workshop to workshop to study the effect of the workshop design changes and to integrate feedback in the next iteration. Fig. 2 shows how the strategy workshop design was modularized and changed according to the requirements of the respective departments in a process where the four workshops are viewed as part of the same development process. At the end of each workshop, the employees evaluated the workshop, and after the workshop, the results were evaluated by the manager and the strategy consultant, who also presented the results to colleagues at the company and to academic peers. Based on this evaluation, the planning of the next workshop with a new department would commence. Particularly the sequence of four consecutive workshops, analyzed as a whole and together making up the iterative prototyping process as well as its problem-orientation distinguishes this study from previous

studies on organization development, e.g. Stavros et al. (2003 on appreciative inquiry).

4. Main findings

The findings pertain to different levels of analysis: first, an account of the modular development of the workshop design across four workshop iterations is described in Table 1, which shows the change log. Second, the micro processes in each workshop module are described based on notes and transcriptions from the workshops. The term micro process indicates that the processes that are analyzed in this paper consist of sentences and stories uttered by the participants individually and collectively in the workshops as opposed to process studies which target analysis of longitudinal organizational processes (Langley et al., 2013).

Table 1 shows that the development of the strategy workshop design continues through four workshop iterations and each iteration can be seen as a test of the design changes from the previous workshop. In addition to a short evaluation by the participants at the end of each of the first two workshops, the iterations were evaluated shortly after their termination by the respective department manager and the author as strategy consultant. The third iteration was a replication of the second iteration, but whereas the second iteration was done for an engineering design department, the third iteration was done with an engineering operation department, the difference being one of employee specialization: design engineers are predominantly highly specialized in designing a few selected components of a diesel engine, and work at their desks at the office, whereas engineering operation engineers are mostly travelling and have hands-on contact with the products to ensure their operation onboard ships. The third iteration would thus work as a control of the

workshop design in a different demographic context. Prior to the fourth iteration, the strategy consultant had discussed with academic peers when would be an appropriate time to introduce the strategy, and had arrived at the conclusion that this should be done at the very first workshop module. The rationale was that the strategy would frame the entire workshop, and it would facilitate the employees' prioritization of possible future actions according to impact on strategy – because they would already be familiar with it – as well as facilitating the re-evaluation of the actions' link to strategy in the final workshop module. In evaluation of the fourth iteration with the department manager and later with academic peers, this design was judged to be the optimal design to solve problems and align solutions/actions with the strategy.

The micro process of each workshop module will now be elaborated to show how the modules worked at the workshops.

Module: storytelling about recent memorable events, including witnessing. The inquiry process followed position maps 1 or 2 in narrative therapeutic practice (White, 2007), which are focused on eliciting stories about recent events. An employee freely chooses a recent event that s/he can remember and somehow feels strongly about. Often the mere selection of the event indicates that the event is somehow important to the employee. The interview facilitates the employee's reflection on why the event seems important. In this empirical context, the purpose of the module was to address implicit knowledge about what the employees perceive as important to their job, something they hold high and strive for. The module process consists of a series of questions that seamlessly enable the employee(s) to formulate and name what they find to be important. The next step is to extrapolate the issues the employees identify as being important and conduct strategic action planning that capitalizes on these important issues. In narrative practice, witnessing can amplify the

Iteration	Department	Development target of iteration	Findings in iteration
1	Engineering Design 1	<ol style="list-style-type: none"> 1. Can free storytelling of recent memorable events, be they positively or negatively perceived by the participants, build a foundation for a qualified discussion of shared problems and strengths in the department? 2. Can participants define their shared core competences? 3. Will a definition of shared core competences facilitate a brainstorm of possible future actions that seek to solve perceived problems or amplify perceived strengths? 4. Can the actions be linked to strategy? 	<ol style="list-style-type: none"> 1. No, free storytelling leads to a lack of focus in the workshop 2. Not effectively: it was a time-consuming activity where the participants read notes from each story told by a colleague and underlined words or structures perceived as a core competence 3. Attention was given to amplifying the perceived shared strengths rather than solving the identified problems 4. Yes the actions were linked to strategy
2	Engineering Design 2	<ol style="list-style-type: none"> 5. Can a theme by theme or question by question discussion of the employee survey results for the particular department facilitate a structured, shared definition of the department's problems? 6. Is the brainstorm of possible future actions more problem-oriented and focused compared to the previous iteration? 7. Does it make sense for the participants to prioritize the possible actions according 	<ol style="list-style-type: none"> 5. Yes without difficulty 6. Yes actions were defined to each identified shared problem 7. Yes it was easy for the participants to evaluate implementation complexity and the relative impact on strategy for each action they defined in the brainstorm 8. Yes when it was time to select one or more actions to be implemented, each action had been discussed in detail including

		<p>to implementation complexity as one dimension and impact on strategy as the other?</p> <p>8. Does the prioritization facilitate easy selection of action(s) for implementation?</p> <p>9. Can an action plan be developed?</p> <p>10. Can the link to strategy be confirmed?</p>	<p>implementation complexity and expected impact on strategy so agreement on selection was reached</p> <p>9. Yes the action plan was collectively defined and agency was exercised to undertake the selected action</p> <p>10. Yes the link to strategy was confirmed</p>
3	Engineering Operation 1	<p>11. Can the workshop design from the previous iteration be validated as an effective design?</p>	<p>11. No the strategy needs to be introduced up front; according to participants, this will facilitate their prioritization and selection of action as well as facilitate the confirmation of the link between action and strategy. Too much time was spent trying to understand the strategy in the middle of the workshop thus pausing the workshop flow</p>
4	Engineering Design 3	<p>12. Does the introduction of the strategy as the first workshop module improve the workshop flow compared to the previous iteration?</p> <p>13. Can the workshop design be validated as an effective design?</p>	<p>12. Yes framing the workshop with strategy provides an effective frame for steering the dialogue</p> <p>13. Yes this design is perceived as logical and effective in identifying problems and solutions and aligning them with a strategy</p>

Table 1. Development targets of the workshop iterations

issues that a person identifies as being important. Witnessing practice involves a group of people listening for particular cues during the inquiry process and engaging in a joint debriefing after the person has finished his/her story. At the strategy workshops, the witnesses were the colleagues of the person interviewed.

The following example from a workshop shows the storytelling process in a narrative therapy interview:

- AK: [...] try to give me a concrete example from your work on the [prototype of engine type] project of something you made where, looking back, you needed more time?
- Henning: yeah for example we didn't make sure that the drillings were placed correctly, some measures weren't included in the drawings, a drain valve was missing, it wasn't verified if some areas were large enough – all this resulted in trouble later on where we had to compensate for some things [...] that may have been avoided if we had had more time to sit and think things through and perhaps spoken with some colleagues in the production who could have spotted the errors and evaluated if it would be a problem. But it is such a funny factor because when do you have time enough? When is it enough or when have you reached a satisfactory result?
- AK: what is your take on it – when have you reached a satisfactory result?
- Henning: [laughs] when it works the first time but it's probably utopian to think we can deliver a 100% product the first time every time, but I think the usual obvious things should be checked [...]
- AK: so when a mail ticks in and says that something doesn't work as intended [...] what do you think?
- Henning: first I think bummer and then you check the errors [...]

- AK: so when the mail ticks in and you think bummer – what would you have preferred instead?
- Henning: I'd like to have avoided the email coming in at all. It hits you on the pride [...]
- AK: so this pride, does it come when the engine works the first time?
- Henning: I don't know, but there are some errors you can't prevent but then there are just stupid mistakes that result from not checking properly and they're annoying [...]
- AK: right, so when they're annoying, what's important to you in your work – what would you like to achieve?
- Henning: I'd like to make a good product and give it a good quality [...]

The problem was unfolded in details that are not included in this excerpt. The retrospective problem-orientation of this narrative interview differs from the prospective positive orientation of appreciative inquiry, i.e. the 4-D cycle: discovery, dream, design, destiny (Stavros et al., 2003), another organization development approach. Henning's interview was followed by witnessing where I turned to the colleagues who had been taking notes during Henning's interview and asked:

- AK: what did you particularly notice that Henning said?
- William: [...] we probably didn't work very efficiently in this case [...] we may deliver the drawings on time, but you might not feel you can vouch for the quality [...] and we want to get it right the first time [...]
- Lucas: I also wrote down quality [Louise: and time pressure] and professional pride
- AK: and what do you think is important to Henning?
- Louise: planning

- Lucas: I also noticed that our errors affect a lot of people so it's not only us that are ineffective, but all of a sudden a lot of people become involved in a small error that could have been avoided if you had had the time to correct it right
- AK: can you recognize anything Henning said in your own work lives? [...]
- Noah: yeah that time matters and that quality depends on time. It feels like all our time is spent modelling and designing and it almost feels like we need to steal time to have the design validated by colleagues in other departments [...]
- AK: ok and where did it take you to hear Henning's story – or do you maybe feel like doing something?
- William [department manager]: to me it is of course important that I try to make time for these projects or the components for the employees right and try to ensure that the right conditions are there for them to do the tasks

Interviewing strategies such as naming abstract entities, providing examples, specification, and checking for resonance and associated issues are foundational for narrative interviewing (White & Epston, 1990). They provided a structure to the storytelling module that allowed the participants to associate freely, but within a particular frame imposed by the workshop and module design. The effect on the conversation can best be described as lingering (Shapiro & Ross, 2002, p. 99), and it created a relaxed atmosphere, conducive for co-authoring problems and solutions that can “grow in importance and power” (Shapiro & Ross, 2002, p. 99).

A module based on storytelling about recent memorable events followed by witnessing can generate joint identity creation for a group of employees. The stories are selected by the participants in an unstructured manner and therefore may lack joint focus. The resonance and transport that the witnessing revolves around is time

consuming and if the resonance and transport from teller to listeners is required in the workshop setting, much time should be spent exploring both story and witnessing. This module is at odds with problem-solving which is very much about zooming in on a particular problem which “recent memorable events” are not.

Module: definition of core competences. Building on the notes from the storytelling module, the participants’ core competences can be elicited. Core competences were simply defined as ‘what we do well in this department’. Here is an example from a workshop showing the top five core competences that the participants identified in the notes from the storytelling module along with their respective word count, i.e. how many times the same word was underlined.

- Core competences: Responsibility for [engine] component (12), From idea to finished component (12), Cooperation (11), Design (safe, high quality; 9), Troubleshooting (8)

However, introducing and asking participants to work with a concept such as core competence can be challenging, here expressed by one of the participants: “it was difficult to get a feeling for these core competences – at least no feelings jumped on me when I read them [after summarizing them]. I mean I barely had time to underline any words because I didn’t have [time to think about what they really meant to me]”. Therefore, this module needs a thorough introduction of the concept of a core competence and much time should be given to thinking about, and identifying, core competences for it to work properly in a workshop context.

Module: discussion of employee survey results. The purpose of this module is to present and jointly evaluate employee survey results for the respective department and identify the participants’ frustrations through an inquiry process following

position map 1 in narrative therapy (White, 2007) with the purpose to externalize frustrations through four steps: 1) negotiation of an experience-near definition of a frustration, 2) mapping the effects of the frustration, 3) evaluation of the effects, 4) justification of the evaluation – similar to the storytelling module, except without the time-consuming witnessing element, but instead focusing on achieving a rich, joint description of the frustrations.

Module: brainstorm possible future actions. The purpose of the module is to jointly generate ideas for actions that will minimize a frustration or maximize a core competence. Transcripts showed that problems (p) were followed by possible corresponding solutions (s) in random patterns:

- $p_1 - p_n - s_1 - s_n$ (first all problems were elicited, then all corresponding solutions were elicited)
- $p_1 - s_1 - p_n - s_n$ (elicitation of a problem was followed by elicitation of a corresponding solution)
- $p_1 - s_1 - p_2 - p_3 - s_2 - p_4 - s_3 - p_5 - s_4 - p_6 - s_5$ (random pattern where solutions to not all problems were found)

The facilitator needs to be flexible and open to the various patterns of problem identification and solution brainstorm and to the fact that a possible and valuable solution to a problem may occur an hour after the problem was initially identified and during a different workshop module. As in the storytelling module, lingering at the formulation of problems and solutions as opposed to progressing quickly resulted in optimal workshop dynamics. The participants' detailed co-authoring of problems and corresponding solutions facilitated prioritization, selection and planning of action at later stages of the workshops because the participants had reached a common

understanding of what the problem entailed and what an appropriate solution could be.

Module: prioritization and selection of action. The purpose of this module is to prioritize just-formulated possible future actions according to their impact on strategy on a 10-point scale spanning small to big impact, and implementation complexity similarly on a 10-point scale spanning low to high complexity. The prioritization leads to the participants selecting one or a number of actions. Prioritization and selection of actions, which is a challenging strategic practice (Salas & Huxley, 2014, p. 111), were facilitated by being framed by the strategy in the first workshop module in the final workshop design. The prioritization according to relative implementation complexity and relative impact on strategy worked well in allowing the participants to gain an overview of their possibilities for action. A thorough discussion of the relativity of the actions catered for participants' qualified decision-making and their exercising of agency: the more they understood the implications of the possible actions and the work they had to undertake to realize the action, the more they exercised agency for the actions that were ultimately selected. The example below shows how the participants supplemented each other in arriving at the final prioritization.

- AK: now we are going to prioritize [the actions found in the brainstorm] – [first action] is that easy or difficult to implement?
- Valdemar: it's easy to make the decision right [and thereby the action is easy to implement]?
- AK: impact on strategy – small or big? [...]
- Sebastian: there's that modularization [...]
- August: could support design methodology

- AK: so up here somewhere [pointing to the workshop poster's prioritization matrix]?
- August: yeah
- AK: [second action] – easy or difficult to implement?
- Valdemar: it's more difficult than it's easy
- August: it takes time at least
- Valdemar: I think it should be more to the right
- AK: impact on strategy – big impact?
- Theodor: I don't think it has that big impact on strategy?
- AK: so down here somewhere?
- Theodor: yeah that's probably more realistic [...]

After the prioritization, actions were selected by the participants.

Module: develop action plan. The purpose of this module was to formulate an action plan for each selected action consisting of action name, desired effect, how and when to evaluate, owner, deadline – a routine task for the participants.

Module: strategy introduction. The purpose of this module was to introduce the diesel engine company's new strategy to the participants at the workshop. This introduction was made by the facilitator with one exception where the department manager presented the strategy. 12 bullet points together making up a strategy one-pager were elaborated and the participants' questions were answered.

Module: link actions to strategy. The purpose of this module is to ensure that the actions that are formulated in the brainstorm module and later prioritized and selected are in fact linked to strategy, which was one of the overall objectives of doing the strategy implementation workshops. Linking actions to strategy was easier for the

participants if they were given a thorough introduction, not only conceptually, but word by word, to the strategy at the beginning of the workshop. Introducing the strategy became a frame for the workshop which facilitated the later brainstorm on possible future actions and allowed the participants to evaluate on a qualified basis the impact of a possible action on the strategy. An example from a workshop:

- AK: I'd like you to look at this strategy poster and figure out [reference to the department's selected action] how does it support the strategy?
- Bertram: well it's supposed to improve the competitiveness which means lower first cost of our components and ensure that the [specific component] isn't too big [...] and that it has a good fit in the ship hull
- August: [it supports] design quality methodology
- Theodor: yeah it fits right in there
- August: it could also be intensify interaction and integration with [particular customer group]
- Sebastian: I suppose you also get more satisfied employees [...]
- August: I see it more like the people who are going to do this can learn something from it [so it's indirectly something about improving employees' skills]

In summary of the main findings, a workshop design was developed through four workshop iterations, each iteration building on the learning from the previous one. Further, the evolving workshop design led to identifiable modular dynamics which were exemplified through examples from the transcripts. The findings are suggestive to strategy consultants wishing to develop a workshop design that is rigorous yet versatile.

5. Discussion and conclusion

Strategy implementation workshop design can be developed in resource-constrained environments through iterative prototyping of the workshop design. Executing empirical iterations of a prototype workshop design and viewing the iterations as interconnected and part of the same development process result in an optimal workshop design that is tailored to the empirical context. The intra- and inter-dynamics of various workshop modules can be tested and evaluated by employees, the department manager and the strategy consultant in each and across iterations to optimize the workshop flow. By selecting an iterative modular workshop design that is developed through iterations, the strategy consultant has at his/her disposal a strategy tool that is easily adaptable to organizational practice and one for which s/he can draw on his/her experience as well as gain and add new knowledge: by performing workshop iterations, the strategy consultant adds to his/her knowledge base in an iterative learning process while improving the strategy implementation in the organization. Although difficulties may be foreseen persuading top management to allow iterations of a workshop design to achieve the optimal modular composition of the workshop, this study at a diesel engine company suggests that the time devoted to iterations is well spent.

With this study, I assert that it can be valuable for strategy consultants to engage in an iterative prototyping process when developing strategy tools such as workshops. Ultimately, the organizational design process may be spoken into being between managers and a strategy consultant, but it is the employees who can benefit from the prototyping process to begin with because they will experience a workshop process that is designed for them – and only later, once the execution of the actions defined at the workshops shows the first results, can top management harvest the benefits of the

added expenditure, in terms of time consumption, of conducting prototyping. Each iteration in the design phase can generate value in its own right and at the same time the workshop design can be optimized through each iteration. This way, developing strategy tools through iterative prototyping becomes a way to maximize the effect of the tool in a way that emulates the employees' work style and allows for their preferences and the organizational dynamics to guide the design.

This study contributes to strategy-as-practice and workshop literature by providing an empirical approach to strategy implementation praxis (Balogun et al., 2015). First, it adds empirical knowledge of how iterative prototyping as a design feature is related to workshop outcomes (Healey et al., 2015; Jarzabkowski & Spee, 2009). Although iterative prototyping of a workshop design blurs the distinction between strategy development (which is what happens when analyses are interpreted, long-term resource planning is made, and the strategy package is formulated and prepared for communication) and strategy implementation (which is what happens when the strategy is communicated to the employees and key performance indicators are planned accordingly), it may only affect a small number of departments and their employees who will function as test subjects in a pursuit of the optimal workshop design. The tradeoff of doing iterative prototyping at the junction in time where the strategy is finished and just before it is implemented concerns giving these few department a sub-optimal workshop. It may be suboptimal because it lacks a rigorous step by step protocol and because it requires time and commitment from these employees (Coghlan & Shani, 2005). This study suggests that the payoff comes in terms of an empirically tested, rigorous workshop design as opposed to a theoretical workshop design that has not been empirically tested, which was the case with prior strategy implementations at the diesel engine company. Additionally, time

consumption is kept at a minimum through fast iterations where prototype modules are removed and new modules added based on the empirical development.

Another contribution to strategy workshop literature that this study makes concerns the structure of workshops as strategic episodes, which consists of initiation, conduct, and termination (Jarzabkowski & Seidl, 2008): the iterative prototyping process at the diesel engine company showed that the optimal strategy implementation workshop design is initiated and terminated by strategy, or in other words, the workshop should be opened and closed by strategy. Initiation came in the form of a detailed strategy introduction; termination came when the actions that were selected (Jarzabkowski & Seidl, 2008) at the workshop were linked to the strategy. This way, the new strategy became the frame of the entire workshop, as Oscar the department manager stated in one of the workshops: “it was a good thing you presented [the strategy] at the beginning otherwise we would have just found some targets independently from the strategy and then afterwards made it fit with the strategy, but the idea is that the strategy affects our choice – that’s the whole point of the strategy”. Charles, an employee in the department, stated the effect of having an introduction to the strategy at the beginning of the workshop and then linking the actions to strategy at the end of the workshop: “if I should use figurative language, it’s sort of like the [four strategic focus areas] are these balloons that are high up in the air so we can’t reach them, but we’ve gotten to a point where you can pull them down [...] I can make more sense of [the strategy] [...] I can look at this [strategy] and pinpoint some places and then say ‘this is where we’ve worked [to support the strategy]’”. With regard to the third structure in a strategic episode, conduct, this study shows that narrative facilitation can structure a brainstorm of actions that support the strategy. By co-authoring plans

for action (Boje, 2001), employees jointly enable strategic change (MacIntosh et al., 2010).

Across all workshop modules, one basic facilitation principle generated a successful workshop that effectively solved problems as well as ensured that the resulting actions were aligned with the strategy: lingering (Shapiro & Ross, 2002, p. 99), i.e. taking time as opposed to pressing on. The more specifically the strategy was explained, the more specifically the problems and their possible solutions were described, the more detailed the prioritization and selection of actions and the action planning was, the more explicitly and clearly was the link between action and strategy described by the participants – thus leading to an effective workshop compared to the objectives of problem solving and strategy alignment of solutions. Lingering and allowing time for reflection was achieved by using facilitation technique from narrative therapy, a practice which has specificity and nuanced, contextual understanding of problems and their solutions at its very core (White, 2007). Narrative facilitation technique was an integral part of the module concerning problem identification, which in this case was related to the employee survey, and the module concerning possible future actions. Therefore, while this study shows that development of the workshop design based on iterative prototyping led to a robust design, it cannot be separated from narrative facilitation, and I invite further praxis-oriented research of iterative prototyping without narrative facilitation of the workshops to further study the organizational effects of using iterative prototyping in an organizational development process.

When strategy consultants receive a new brief by a client, they draw on their experience in designing the process to meet the objective stated in the brief. Achieving the objective involves design features, tools and techniques already known

to the strategy consultant, but may also, depending on the task at hand, involve new, unknown design elements. While developing new possible designs, knowledge about the inter- and intra-dynamics of the design elements is essential to the strategy consultant. The in-/exclusion of a workshop module leads to different workshop dynamics as demonstrated in the findings above. This study emphasizes the importance of the qualifications and experience of the strategy consultant in designing a successful strategy tool and it supports the strategy-as-practice agenda of developing qualified practitioners (Whittington, 2003) by contributing relative importance to strategy praxis such as the design process of a strategy implementation workshop.

The organization type may matter to the success of iterative prototyping. It may have helped this multiple case study that the company's product is design of diesel engines, so managers and employees taking part in the iterative prototyping of a workshop design were already accustomed to working with design processes, albeit product-related ones. Organizations with less affinity to design processes may be less favorably disposed to working with iterative prototyping in connection with strategy processes. The diesel engine company's strategy was loosely formulated and centered on broad objectives, and the business areas and their departments autonomously interpreted the strategy and planned actions that were evaluated by department managers and employees to support the strategy. An organization with a blueprint strategy that cascades quantified targets from top to bottom (Mintzberg et al., 2005, p. 57) may be less suited for this kind of workshop design development.

Knowledge and understanding of strategy implementation can be improved by focusing on the transfer of concepts and their associated processes from the design realm to organizations. This study suggests that iterative prototyping offers promising

possibilities for organizations seeking to augment alignment of problem solving and action planning in connection with strategy implementation through a resource-light endeavor such as a three hour workshop.

4.3 The effectiveness of strategy tools: narrative facilitation of strategy implementation workshops

The below article is the first revision of the script, adapted to the constructive comments of two anonymous reviewers, which was re-submitted to the Action Research Journal on 18 April 2018.

The effectiveness of strategy tools: narrative facilitation of strategy implementation workshops

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Abstract

This study is an attempt to meet a general challenge facing a strategy consultant's choice of tool: 'how do you know your tool works?'. This question is inherently difficult to answer and in this single company multiple case study, we test narrative facilitation of strategy workshops that aimed at implementing strategy and propose a method for measuring its effectiveness. We used a Mann-Whitney U-test to statistically compare the effectiveness of facilitating workshops with and without interview technique from narrative therapy. The study shows that an empirical comparison of the effectiveness of narrative facilitation technique can be made statistically through a Mann-Whitney U-test when part of the workshop data, e.g. employees' self-evaluation of possible actions' impact on strategy, can be numerically evaluated. The study also gives valuable insight in how an effective facilitation technique can be empirically condensed through expert reviews and

sorting and naming exercises resulting in a prescriptive guide to effective facilitation of strategy implementation workshops and thus adds empirical detail to the ongoing discussion of measurement methods in action research design.

Purpose

The purpose of this paper is to meet a general challenge facing strategy consultants: ‘how do you know your tool works? This question is inherently difficult to answer because using one tool (e.g. a workshop) naturally excludes the use of another and thus a comparison. While such comparisons are essential for furthering the field of strategy consulting, they have been the subject of little empirical research. We empirically explore this challenge through the case of 12 strategy implementation workshops at a diesel engine company. The purpose of the workshops was to solve problems indicated in a recent employee survey while ensuring that the resulting actions were aligned with the new strategy. The specific challenge for the strategy consultants in this case was to mobilize the tacit knowledge of a workforce that was highly segmented into several different specializations and that had no common language for articulating shared problems. The strategy implementation workshops at the diesel engine company provided the empirical setting for the research question: how can the effectiveness of a facilitation technique for a strategy implementation workshop be assessed and how can an effective facilitation technique be presented in a short, standardized form to guide strategy consultants?

In this study, we use the workshop participants’ self-evaluation of the strategic impact of the actions they formulated during the workshops to assess the effectiveness of the workshop: high relative impact on strategy was used as an indicator of effectiveness in a strategy implementation context. We combine a

qualitative case study with elements of a field experiment for a mixed methods approach, and we present a step-by-step guide to effectively facilitating strategy implementation workshops. We also construct an interview guide based on the effective facilitation technique that can be used in workshops by a group of people such as departments or project teams for structured problem solving and strategy alignment when an experienced facilitator cannot be present at the workshop, thus mirroring a basic condition for many organizations. By providing a prescriptive facilitation guide, we accommodate managers' and strategy consultants' need for scalable strategy tools: they cannot only work in the presence of an experienced facilitator; they should also work in their own right. Further, we sought to bolster the generalizability of the effective facilitation technique by subjecting it to review by external strategy consultants and by validating it using labeling and sorting exercises with company employees.

Outline

The paper is structured as follows: we begin by describing the empirical background for the study and why the multiple-case study at the diesel engine company is useful. We then situate our study in the stream of action research studies. In the method section, we introduce interview technique from narrative therapy as a facilitation tool in strategy workshops, review the methods used in previous action research studies with specific linkages to effectiveness assessment, describe our data collection which includes a sorting and labeling method for standardizing a facilitation technique. The results include the effectiveness assessment of data from twelve workshops: six with and six without narrative facilitation. The assessment is followed by an account of how we distilled the most important questions from the strategy workshops into a prescriptive interview guide that other strategy consultants can use directly in their

own organizations. We achieved this through a review of the facilitation technique by three strategy consulting agencies followed by two exercises where employees at the diesel engine company first sorted 50 questions from the transcript into two clusters, labeled the clusters, and then condensed the 50 questions to six questions that represent the core of the interview technique. The interview guide is supplemented by a process and context guide to increase the instrumental relevance to strategy consultants seeking to use narrative facilitation technique. We present the experiences of the facilitator and the workshop participants to supplement the effectiveness assessment, and address the limitations of the study. The paper concludes that an empirical comparison of the effectiveness of a strategy workshop facilitation technique can be made statistically through a Mann-Whitney U-test when part of the workshop data can be numerically evaluated, and that combining qualitative and statistical elements in an action research design can enhance the specialization of strategy practitioners.

Background

The diesel engine company had gone through two decades of success, but a downturn in international shipbuilding led to the need for a new strategy. During the successful years, everyone's attention had been focused on meeting customer demand for engines, and organizational problems were only perfunctorily dealt with. In 2016, an employee survey showed predominantly negative responses concerning roles and processes, and top management decided that the organization needed to find the root cause of the problems while ensuring that the solutions were aligned with the new strategy: a strategy workshop was therefore planned for the departments with particularly negative responses in the employee survey. The task to develop and facilitate the workshops was given to the first author in his capacity as in-house

strategy consultant with a nine-year tenure at the company at the time of the task assignment. Based on a two-year part time training course in narrative interview technique, he had formerly facilitated other types of workshops, such as to define key messages in connection with international projects and develop a department strategy using narrative methods, in addition to conventional narrative coaching of managers. The effectiveness of the narrative facilitation, however, had never been explored because the previous workshops had always been one-offs, so there was never an opportunity to assess the facilitation technique against a control group.

In pursuit of an assessment of whether narrative facilitation of strategy workshops is effective compared to not using it, the first author therefore made an agreement with the managers of twelve departments that he would facilitate half the workshops using narrative interview technique. To eliminate any unconscious bias in the control workshops, which might produce a negative result in terms of showing the effectiveness of the narrative facilitation technique, it was agreed that he would not participate in them: they would be facilitated by the department managers themselves who had no prior knowledge of narrative interview technique. This methodological choice is a limitation in a purely experimental approach, in which as few variables as possible must change to enable comparison. The facilitator should therefore have been the same person in all twelve workshops, but deviating from this was deemed necessary in the quasi-experimental setting at the diesel engine company, a choice which reflects the opportunistic nature of action research methods (Greenwood, 2015, p. 199). However, strategy consultants are not always available in organizations and not all workshops can be expected to be facilitated by the same person. We therefore argue that conducting some workshops with a facilitator and others without (conducted by the department manager or another member of staff) is normal

organizational practice. Therefore, although the issue of the facilitator's presence/absence does not meet the conventional criteria, this action research study's design is common practice in organizations faced with busy production schedules and critical attention to time and money.

Action research

This research is positioned within the organizational development (OD) tradition of action research (Coughlan, 2011b). In OD, action research is concerned with change that is brought about in close collaboration between researcher and practitioners through cycles of diagnosing, planning, acting and evaluating (Saunders, Lewis, & Thornhill, 2015). Action research must focus on real-life issues relevant both for theory and practice through collaboration that integrates systematic research, reflection and scientific knowledge (Coughlan, Draaijer, Godsell, & Boer, 2016).

The first author acted as insider action researcher (Roth et al., 2011), defined as a person who is an organizational member and a researcher at the same time, which offers the possibility to engage in action while having the opportunity to withdraw and reflect (Coughlan, 2001, 2003). The advantage of conducting insider action research is the opportunity for deep organizational embeddedness and contextual understanding that can lead to findings that are not available from an ethnographic perspective as an observer, and which enable the insider action researcher to acquire a different and perhaps deeper understanding (Eady, Drew, & Smith, 2015). Our insider action research has a dual purpose to develop better strategy workshop outcomes *and* learning in action. The limitation of the insider action researcher position is that the embeddedness can have a blinding effect on the researcher who can become subsumed by the organizational practice s/he is a part of. The position as

insider action researcher therefore requires honest and transparent reporting of the empirical context and data collection (Huang, 2010, pp. 102–103).

Method

This is a single-company multiple-case study where each strategy workshop can be regarded as a case study, and all cases were conducted at the diesel engine company. Like Russell, Walsh, Scott & McIntosh (2014), we use a case/control design to assess the effectiveness of narrative facilitation of strategy workshops. Additionally, we use sequential integration of data and quantify after the intervention (Martí, 2016). This methodological approach has been found suitable for evaluating action research projects and generating a learning potential for practitioners as well as researchers (Martí, 2016). Concerning sampling, the participants at the workshops came from the engineering departments with the lowest score in a 2016 employee survey. Each workshop included the department manager and his/her staff. In the workshops the first author did not facilitate, the respective department manager took on the role as facilitator.

The effectiveness of narrative facilitation was only assessed based on available documentation from the workshops and no longitudinal follow-up of the actual implementation of the actions that were planned at the workshops was made. Although the long-term implementation would have added interesting and relevant detail to the effectiveness assessment, only using the data that was produced at the workshops allowed us to focus on and assess the behavior of the facilitator and participants at the particular workshops. The comparison of data from the workshops with/without narrative facilitation was made as soon as data from all twelve workshops was collected.

Narrative interview technique

Narrative therapy is a talk therapy form that is based on the premise that people understand their lives in a storied – narrative – form (Polkinghorne, 2004, p. 53) and it is “intensely concerned with facilitating change” (Barry, 1997, p. 31). The change is related to the client’s problem for which s/he pursues therapy, and the change is sought and facilitated by the narrative therapist through influence mapping (White & Epston, 1990). By mapping the problem’s relations by way of externalization of its relations and effects on the client, the problem becomes the problem – not the client – an adage of narrative therapy. Narrative therapy’s primary focus is on exploring and detailing events where the problem was present and either negatively impacted the client or where the client or another person managed to exert some sort of influence over the problem, thus addressing ways to influence the problem, which can result in a greater sense of agency (Barry, 1997, p. 33; Polkinghorne, 2004, p. 55). Therefore, we propose that an interview structured by interview maps from narrative therapy can be useful in solving organizational problems in a structured manner (Barry, 1997, p. 35). The structure is provided by the interview technique’s question categories, which help the interviewer structure the interview: s/he can jump back and forward between the categories, but the overall progression of the interview should follow this pattern (White, 2007):

1. negotiating an experience-near and particular definition of the problem/solution
2. mapping the effects of the problem’s/solution’s activities
3. evaluating the effects of the problem’s/solution’s activities
4. justifying the evaluation

Narrative therapy's rigorous, yet versatile and dynamic, interview technique can facilitate employees' elicitation of problems that can be externalized and well defined, as well as corresponding solutions in the form of possible future actions. The interview technique is rigorous because it is structured via the question categories which can guide the facilitator's questions, and it is dynamic because it can be used for a variety of problems and solutions and because each stage of the interview offers room for dwelling and speeding up according to the contextual need. The question remains, however, how we can test its effectiveness. In a therapeutic context, a randomized control trial showed positive, sustainable results from narrative therapy that were comparable to the effects of cognitive-behavioral therapy, psychodynamic-interpersonal therapy, and process-experiential therapy (Vromans & Schweitzer, 2011). Compared to other types of therapy, however, the advantage of narrative therapy for the practitioner is that it is practice-oriented and immediately applicable by a therapist-cum-facilitator and can be easily transferred outside of the consultation room. In an organizational context, narrative interview technique can aid promotion of psychosocial well-being (Hutto & Gallagher, 2017, p. 166) and enhance employee agency through the definition of future trajectories (p.158), which is a strategic activity (Mirabeau & Maguire, 2014, p. 1211). The effectiveness of narrative therapy as a facilitation tool in an organizational or strategic context remains uncharted.

Effectiveness assessment

Empirical assessments of the effectiveness of interventions are common in healthcare (Viswanathan et al., 2004). Here, the purpose is to assess the effectiveness of clinical interventions, e.g. a particular drug, compared to zero intervention or another intervention. Frequently, the clinical settings of healthcare research enable the comparison of a pretest with a posttest either using survey methods for data

collection (e.g. Russell et al., 2014), similar to previous strategy workshop studies (Healey et al., 2015; van Aaken et al., 2013), or using a statistical assessment to gauge the effectiveness of a clinical intervention based on laboratory data of a test group versus a control group (e.g. Rönsholt, Ullum, Katzenstein, Gerstoft, & Ostrowski, 2013). While organizational interventions bear little resemblance to the randomized control trials of healthcare, strategy consultants also need to know how effective an intervention is. We therefore suggest that strategy consultants can be inspired by healthcare in our quest to assess the effectiveness of a strategy tool.

More specifically, in a workshop aiming at aligning action planning with a strategy to support strategy implementation, we need a test that shows whether one type of strategy workshop facilitation is more effective than another type of facilitation. A test can be done by simply counting the number of times a value from one type of workshop wins over and is tied with comparable values from the other type of workshop – a win can be counted as one, a tie as 0.5. This simple test is automated in the Mann-Whitney U-Test (Hart, 2001), which was used by Rönsholt and colleagues (2013), which not only does the counting, but also gives a measure of probability: is the type A workshop more effective than type B and is the difference significant? One of the advantages of using this automated test is that it does not require a normal distribution of the data and that the number of values in the samples that are compared can differ – or in practice: the test can compare 23 actions from one type of workshop with 15 actions from another type of workshop, thus accommodating the messy and opportunistic character of data from action research (Greenwood, 2015, p. 199).

Data collection at the workshops

A six step strategy workshop process was specified and materialized in a workshop poster that could ensure that all workshops were conducted using the same process:

1. introduction of the strategy (a strategy one-pager was presented in relative detail and the participants could ask questions afterward)
2. discussion of perceived problems or frustrations by the employees of the department, using the recent employee survey as reference document
3. brainstorm on possible actions that would solve the frustrations
4. prioritization and selection of actions
5. development of an action plan
6. confirmation of the actions' link to strategy.

The workshop poster was presented to the managers who were briefed about the workshop process. An introduction of narrative facilitation technique, however, was not part of the briefing package. This allowed us to compare workshops with the facilitation technique conducted by the first author with workshops conducted by managers with no knowledge of the facilitation technique, while ensuring that the workshops had the same design via the poster. Step 4 was particularly important to our effectiveness comparison: employees prioritized their possible actions, physically represented by a post-it note for each action, in a prioritization matrix (Fig. 1) with 'easy to implement' as lower boundary and 'difficult to implement' as upper boundary on the x axis, and 'small impact on strategy' as lower boundary and 'big impact on strategy' as upper boundary on the y axis. This allowed us to compare the relative placement of post-it notes in the coordinate systems from the workshops with narrative facilitation to the workshops without narrative facilitation. Because the

objective of the workshop was to align action planning with strategy, we focused our comparison on the y axis.

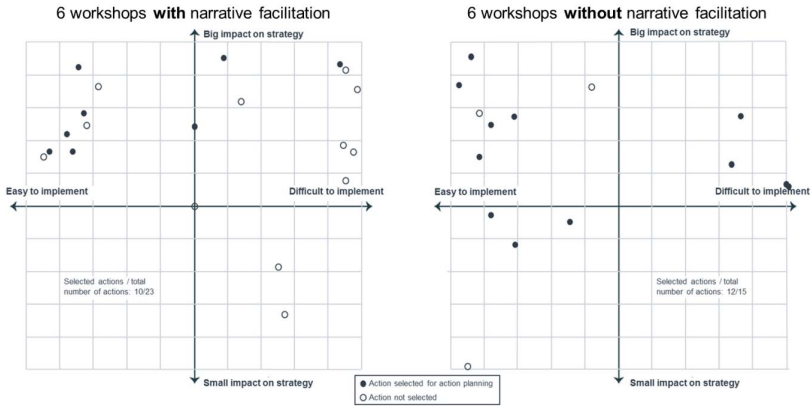


Figure 1. The prioritization matrix

After collecting the workshop posters from the 12 workshops, we applied a 10-point grid to the coordinate systems, measured the relative placement of post-it notes, and observed the y value for each post-it note denoting a possible future action. We also noted whether the action was selected or de-selected for action planning. We then performed the Mann-Whitney U-test.

Results

The Mann-Whitney U-test shows that although the narrative therapy-facilitated workshop participants selected two fewer actions (n=10) than the participants in the workshops without this facilitation (n=12), the actions the participants selected had a significantly higher impact on strategy: the median relative impact on strategy of

Data from six workshops	WITH narrative facilitation	WITHOUT narrative facilitation
Visualization of selected actions' impact on strategy		
Number of actions prioritized	23	15
Number of actions selected	10	12
Employees' self-evaluated relative impact on strategy of selected actions (1 small impact; 10 big impact)	7, 7, 8, 8, 8, 9, 10, 10, 10, 10 (median: 8.5)	4, 5, 5, 6, 6, 7, 7, 8, 8, 8, 9, 10 (median: 7)
Mann-Whitney test	Mann-Whitney U = 26, n1 = 149, n2 = 104, p = 0.0216 two-tailed	
Number of workshop participants including managers	47 (average: 7.83)	66 (average: 11.0)

Table 1. Workshop data

actions defined in workshops with narrative facilitation was 8.5 compared to 7 in workshops without ($p = 0.0216$; Table 1). The statistical test of effectiveness suggests that participants were enabled through facilitation by interview technique from narrative therapy to devise problem-solving actions that were aligned with strategy to a greater extent than workshops without the facilitation.

Although an ex post assessment of data from action research may be challenged from a purely quantitative perspective, we argue that the relevance and benefit to strategy consultants outweigh methodological concerns. Thus assessing the effectiveness of a facilitation technique gives strategy consultants a tool for quantifying the effect of an intervention. To make narrative facilitation easily available to fellow strategy consultants, we below describe how a distilled version of the questions asked at the workshops was defined through sorting and naming exercises with employees at the diesel engine company and what the final result was, and finally we discuss the implications for action research.

Review of facilitation technique by consultancies

To further enhance the external validity of the study, we presented the facilitation technique, in the form of excerpts from the 288 pages of transcript from the six workshops with narrative facilitation, and the statistical comparison to management/strategy consultancies, so that they could review the facilitation technique's possibilities and disadvantages. Out of six strategy consultancies in the same geographical area as the diesel engine company, one declined a presentation, one asked for further information but did not respond after receiving it, one did not respond at all, and three accepted our invitation – one asking us to present it to two different units. So in the end, we presented the study to consultancies four times.

After a one-hour presentation and discussion of the applicability of the facilitation technique, we asked the consultants present at the presentation to send us feedback. They wrote that the facilitation technique could be useful for (excerpts):

- “creating a dialogue about the core of the problem and not just noisy moaning”
- “creating a direct link between strategy and actions by individual employees“
- and that “organizations and managers shouldn’t be afraid to give room [Danish: give plads] for investigating problems/challenges”
- and that “the facilitation technique seems to be able to handle opposition at the same time as creating drive and direction, so that problems become manageable”

The facilitation technique could be particularly applicable in situations such as:

- “where you have a common goal or challenge”
- “launching a new strategy or kick-off”
- “large scale change projects that require users across the organization to be heard and understood”
- “making actions that support strategies, values and change related efforts”

They finished their evaluation by pointing out the weaknesses of the facilitation technique:

- “the implementation [i.e. knowledge of] of the technique”
- “the technique has been developed with a decade of experience [with reference to the first author’s tenure] in the specific company”
- “acceptance by all parties [managers and employees] so it may be advantageous to use a facilitator without prior knowledge of the situation”

- “it is important that the approach is not made too academic to the organization – tools of this kind need to be self-facilitating to be relevant in large organizations where the distance from the top to the frontline is often long”

After evaluating the feedback from the consultancies, we decided to follow the advice (see last bullet) to make a ‘stand-alone’ interview guide with built-in narrative facilitation so that it can work to solve problems and ensure alignment of solutions with strategy without the presence of a trained narrative facilitator (such as the first author who participated in a two-year part time narrative coaching education). In an action research perspective, the insider action researcher in this case can also be regarded as a method developer: we made an intervention, assessed its effectiveness, and then standardized it so that others can hopefully put it to use.

Validation by employees through sorting and labeling exercises

In pursuit of an interview guide with built-in effective narrative facilitation, we first collected all facilitating questions from the 288 pages of transcript with a total of 123,448 words from the six workshops with narrative therapy facilitation: after eliminating doubles, the result was 50 questions cited verbatim from the workshops. Three randomly selected employees in the engineering area were invited to take part in an unlabeled sorting exercise where they screened the 50 questions, clustered them into an unspecified number of categories, and named the categories. They then formulated 1-2 exemplar questions for each category they defined, respectively. We synthesized their findings into two categories, using their own words to the extent possible: the first category was “discover the cause of the problem and get to the core of it,” the second was “find and plan possible solutions” – thus corresponding

perfectly with position map 1 and 2, respectively, from narrative therapy (White, 2007). The first category had four exemplar questions and the second had three, i.e. by the end of the first sorting and labeling exercise, the 50 questions were distilled to seven, distributed in two categories.

In a second sorting and labeling exercise, we asked three other randomly selected employees in the engineering area to cluster the exemplar questions into the two categories and to order the exemplar questions in a way the three employees found suitable for a problem-solving workshop. Before completing the task, two participants expressed their dissatisfaction with one of the exemplar questions, and after discussing the particular question with the third participant too, we collaboratively decided to take the question out of the exercise and to continue with the remaining six questions. The result of the sorting exercise had inter-judge reliability of 100% meaning that all three participants clustered and ordered the questions in exactly the same sequence in both categories: unlabeled and labeled sorting can establish face and content validity and the target is to achieve more than 80% inter-judge reliability (Moore & Benbasat, 1991). Inter-rater analysis has previously been reported as helpful in an action research context (Kingsley & Chapman, 2013, p. 559). The resulting interview guide is based on the statistically effective facilitation technique at the diesel engine company where it was preceded by a strategy introduction and followed by prioritization and selection of actions, action planning, and a confirmation of the impact of the selected actions on strategy. For optimal effectiveness, the narrative therapy ideal of dwelling at and not rushing each problem and possible solution should be adhered to.

Guides to effective strategy implementation workshops

Discover the cause of the problem and get to the core of it

1. What is the problem? Give a specific example
2. What does the problem prevent you from doing? Describe the effect
3. What is the real cause of the problem?

Find and plan possible solutions

1. What possible solutions are there that target the real cause of the problem and that minimize the effects of the problem?
2. What can you achieve through these solutions?
3. What impact will these possible solutions have on your efficiency and job satisfaction?

Table 2. The narrative interview guide that was made as a result of the sorting and labeling exercises

Organization of the workshop

Agree in advance with the participating department manager that s/he participates on equal terms with his/her employees thus suspending the management hierarchy during the workshop – this will facilitate participants' agency to implement the selected actions.

At the beginning of the workshop, present the objectives of the workshop clearly, then present the workshop design, i.e. step-by-step describe the tasks of the participants.

Position of the facilitator

The facilitator should emulate the position of a therapist and have process control, but not content control, i.e. ensuring that the workshop progresses according to the predefined objectives.

Qualification of the facilitator

Strategy consultants, skilled and experienced in the art of facilitation, would do well to inform themselves about the prospect of narrative interview technique as an aide to their consultancy work. An introduction can be found in chapters 1 and 5 on problem identification and solution finding, respectively, in the easily-read book *Maps of Narrative Practice* by Michael White (2007) which, although reporting on clinical practice, is transferrable to an organizational context.

Attention of the facilitator

Most time should be spent at the first stage of the narrative inquiry where an experience-near definition of a problem/solution is negotiated before progressing to the next stages of the interview. Be open to going back to an earlier workshop stage.

Table 3. Process and context guide to accompany the narrative interview guide

Experiences from the workshops

So far, the paper has focused on a third person inquiry of whether the intervention, in the form of the strategy workshops, was effective against the pre-agreed objective to align future action with the new strategy. Here we will discuss effectiveness from the first person perspective of the first author as facilitator, and the second person perspective of the participants' experience.

As facilitator of the workshops, the first author used the principles of narrative therapy to elicit problems so that these became 'experience-near' in participants' stories about particular events that they could remember: the more specific an account of a problematic event or course of events, the more conducive it was to identifying possible solutions. It seemed that dwelling at the detailed level of events helped penetrate the participants' superficial pre-conceived ideas about problems and their causes. Compared to the subsequent question categories in narrative therapy (see the categories in the subsection "Narrative interview technique"), most time was spent exploring the sequences of events that characterized the problems. Because this micro orientation toward details of past events was novel at the company, it appeared to make a positive difference in the participants' individual and collective understanding of the problems raised at the various workshops. When participants tried to regress to unconstructive superficial moaning about the problems, the first author relied on the narrative technique to steer the discussion back on track, which it effectively did according to his perception.

The second person experience, as stated by the participants and documented in the audio recordings and transcript, supports the view that the experience-nearness of the

elicited problems was foundational for the workshop process, as three participants stated in their respective workshops:

- Valdemar: “we have gone in-depth”
- Lucas: “[having the workshop] has forced us to talk about some of the things that frustrate us on a daily basis [...] it has required that we sit down, as we’ve done now, and forced us to think about it, right, and I think that’s pretty good”
- Noah: it’s good that [the workshop] starts with strategy because it sort of pulls our focus out of our own department and upward

The contribution of narrative interview technique to the strategy workshops is thus about reorientation and refocusing attention away from participants’ usual deadline and implementation focus which does not allow in-depth dwelling on problems. The strategy workshop process and narrative facilitation provide the participants with a space where they can first go deeper and explore problems in detail, and then go higher and link future actions that will solve problems to the company’s strategy.

Limitations

The workshops were held at the company in a common work form that the participants were familiar with from normal work situations, which strengthens the study’s external validity (Rothwell, 2005). However, data collected through action research methods is opportunistic (Greenwood, 2015, p. 199). Consequently, a number of limitations are relevant for this study (see Table 4). We recognize that our data collection is suboptimal compared to healthcare clinical trials, but we note that this will nearly always be the case for action research on organizational interventions. Research borne out of action can never be as neatly and tightly planned and executed as called for by qualitative and quantitative methodologies that strive for distance

between the researcher and the researched (Greenwood, 2015). When organizational action researchers pay attention to and often drive interventions that change organizations, at least part of our data is out of our control. Although we can subscribe to and strive to meet a certain standard for data collection, this is not always possible. Does this mean that we shouldn't share our findings or that they cannot be informative to other action researchers and practitioners? No, but we need to present our data and the empirical context in which the data is collected as honestly and transparently as possible (Huang, 2010, pp. 102–103), to constitute the authenticity of the researcher and the study (Coghlan, 2011a, p. 75).

Future research to substantiate or further this effectiveness assessment in a Danish for-profit company can advantageously be conducted in other similar companies or dissimilar companies in cultural contexts where workshop participants can be expected to be less prone than the Danish employees at the diesel engine company to share their experiences about organizational problems. Another possible focus area is sampling: our assessment is based on 12 workshops with a total of 22 selected actions out of a total of 38 identified actions – larger numbers would have been more desirable in an experimental setup. With this larger sample, more methodological controls can be introduced to minimize possible bias, such as random sampling, consistent use of the same facilitator in workshops with/without narrative interviewing, and comparison of facilitators with little and comprehensive knowledge of narrative interviews, respectively. However, although it would have been satisfactory to meet the quality criteria from experimental quantitative methodology, action research has something else to offer: an effectiveness assessment that is directly transferrable to organizational practice and can be calculated using free

online statistics resources (e.g. <http://www.socscistatistics.com/tests/mannwhitney/>) to guide strategy consultants' work.

Limitation	Problem	Our countermeasures
The first author only conducted the workshops with narrative facilitation, not the ones without	In an experimental setup, the facilitator's presence is required in both types of workshops for a proper comparison of results	The presence and absence of strategy consultants vary in organizations, and conducting some workshops with a facilitator who is not a member of the department and others where the department manager acts as facilitator was normal organizational practice at the diesel engine company
Convenience sampling: lack of randomized sampling of departments	Managers may have agreed to be part of the research study due to their familiarity with the first author as in-house strategy consultant	As counter-balance we only included workshops with the exact same process (five workshops were excluded) to maximize consistency
Social desirability	Participants may have anticipated that the aim of the workshop was to select actions with a high impact on strategy and thus positively biased their evaluation of an action's strategic impact	We have collected measures and prioritization through a discussion between several individuals (Podsakoff, MacKenzie, Lee, & Podsakoff, 2003, p. 887)
Manipulation	Can we claim that narrative interview technique was really used?	All participants confirmed that they recognized narrative interview phases in a post-workshop manipulation check (Colquitt, 2008, p. 619)

Table 4. Limitations of the effectiveness assessment

Conclusion

The effectiveness of a facilitation technique for a strategy implementation workshop can be made statistically through a Mann-Whitney U-test when part of the workshop data, e.g. employees' self-evaluation of possible solutions' impact on strategy, can be numerically evaluated and empirically compared to workshops without the facilitation technique. The test can inform strategy consultants whether a facilitation technique is effective compared to not using it. Using a statistical effectiveness assessment in a non-experimental empirical action research setting requires a contextual re-evaluation of quantitative sampling criteria. A statistical assessment using data generated through action research cannot be expected to meet the criteria for true experiments which call for equivalence between control and treatment groups through random assignment. Rather, data collection through organizational interventions depends on the empirical possibilities of the intervention, but this does not preclude statistical assessment provided that the empirical context is presented transparently and honestly. This study shows that benefits for practitioners can be gained from borrowing assessment tools from other research domains, e.g. using effectiveness assessments from healthcare in a study of strategy workshops.

An interview-based facilitation technique can be standardized by identifying questions in workshop transcripts, clustering them according to a relevant domain theory, in this case narrative theory (White, 2007), and subjecting the large amount of questions to a sorting and labeling exercise where employees boil down the many questions to a few and formulate exemplar questions to form a standard interview guide.

This study is qualitative, coupled with statistical elements in the effectiveness comparison. Although qualitative methodology does not allow us to theoretically generalize based on the study's findings, we have striven to increase the external validity and methodological generalizability of the study by subjecting the findings to critical review by three consultancies who pointed out the strengths and weaknesses of the facilitation technique. The prescriptive interview guide with built-in narrative facilitation was developed through two structured labeling and sorting exercises with employees at the diesel engine company. Our aspiration is for the interview guide to serve as an introduction to the narrative facilitation of problem solving and solution identification in strategy contexts. The interview guide is thus only a time-limited starter package that will allow strategy consultants to move forward as they become more experienced narrative facilitators. We therefore encourage you – the strategy consultants and kindred spirits reading this – to use and further develop the interview guide for your own organizational purposes and to report on the effectiveness of your studies. Only then can we together tackle the challenge of knowing whether our strategy tools are effective.

Acknowledgements

The authors wish to thank Dr. Hilary Bradbury for leading the review process of this article and two anonymous reviewers for very constructive comments.

Funding

This study was supported by grant no. 4019-0002B from Innovation Fund Denmark.

4.4 Coding of micro activity at strategy workshops

The below article was submitted to the International Journal of Qualitative Methods on 18 April 2018.

Coding of micro activity at strategy workshops

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Abstract

Aim: This article aims to demonstrate how the coding of micro activity at strategy workshops can provide valuable information to workshop facilitators; and to discuss the implications for the analysis of strategy workshops. **Participants and methods:** Our data consists of transcripts from six three-hour strategy workshops involving a total of 43 employees at a diesel engine company. We have analyzed the transcripts through first and second order thematic coding and subsequently by dissecting the second order codes into micro activities to identify causal and temporal patterns across the workshops that may be instructive to workshop facilitators. **Results:** Coding of micro activity enabled visualization of the second order codes and their interrelations could be theoretically as well as empirically determined. **Conclusion:** From a methodological perspective, coding of micro activity is a promising novel

qualitative analytical approach. Although it is an added complication to an already comprehensive qualitative analysis of transcripts, coding of micro activity has the potential to be valuable also to facilitators of strategy workshops who can optimize the workshop process based on the micro activities that can be visualized.

Keywords: coding strategy, micro activity, strategy workshop, qualitative research

What is already known

Paying attention to strategy activities at the micro level can lead to the development of more qualified strategy practitioners (Whittington, 2006). The strategy-as-practice field defines micro activities, such as solution-finding and future action planning, as ‘praxis’ which is the enacted (Jarzabkowski, Kaplan, Seidl, & Whittington, 2016b) human activity that is involved in strategy-making, and an assemblage of several praxes constitutes a ‘practice’ (Vaara & Whittington, 2012, pp. 287–288). Researchers thus call attention to the entanglement of praxis, practice and practitioners in the study of strategizing. Case studies of strategy workshops, analyzed by ethnographic researchers and based on the analysis of observations, audio/video recordings, interviews, and documents, have been the primary fuel of the strategy-as-practice research agenda (Jarzabkowski & Seidl, 2008; Johnson et al., 2010; Kwon et al., 2014; Liu & Maitlis, 2014; Paroutis et al., 2015; Schwarz, 2009) with survey analysis as an infrequent supplementary method (Healey et al., 2015; van Aaken et al., 2013). Studies using qualitative thematic analysis of strategy workshops have yielded important insights into praxes at strategy workshops as a strategy practice by identifying and describing themes at strategy workshops. Thematic analysis of strategy workshops as case studies is thus an ideal means to answer a ‘what’ research question which leads to conclusions at the conceptual level (Yin,

2013, p. 132). However, no previous strategy workshop study sheds light on the temporal and causal development of micro activities at the workshop event itself – all studies have remained at the thematic analysis level.

Studies in other domains have incorporated various temporal orientations in their research design: First, from an empirical perspective, establishing timelines has been used to encourage rich narratives in connection with fatness and weight loss (Sheridan, Chamberlain, & Dupuis, 2011), substance abuse and treatment (Berends, 2011), homelessness (Patterson, Markey, & Somers, 2012), traumatized immigrants (Kolar, Ahmad, Chan, & Erickson, 2015), and work-related stress in small and medium-sized enterprises (Ipsen, Gish, & Poulsen, 2015). The temporal aspect thus served to facilitate rich themes and theory-building during a retrospective interview about a past event or intervention, not to analyze the temporal and causal development at the intervention itself. Second, from a methodological perspective, Miles, Huberman and Saldaña (2014, p. 320) include “determining temporal order/temporal relationships” on their list of codes for drawing conclusions, but do not exemplify. Similarly, chronological sequences of case studies have been analyzed to describe time-series trends to build theory (Yin, 2013, pp. 154–155). The four studies that Yin cites to exemplify how case studies can be used to explore “how initiatives produce their outcomes” (2013, p. 225) focused on the longitudinal effects of their respective themes: an initiative takes place and as time goes by it becomes possible to describe the effect of an initiative. Analytic generalization (Yin, 2013, pp. 41–42) was done at the longitudinal process level.

What this paper adds

We propose that conventional thematic analysis from a longitudinal perspective can be supplemented by the coding of micro activity at a strategy workshop. In contrast with thematic analysis, we will dissect the themes and concepts that arise during the thematic coding and structure them according to the interconnections of the micro activities. More practically, we will do this by splitting up the second order themes, each with rich representation of references in transcripts, into micro codes that may be represented by only a few references, hence ‘micro code’. Slicing up the workshop transcripts into micro codes will allow us to analyze how they are interrelated and how this may be supported by relevant theory. This analytical approach will enable qualified answers to ‘how’ research questions by identifying how the micro activities at a strategy workshop manifest and by analyzing their interconnections. This research is potentially instrumentally relevant to strategy practitioners such as workshop facilitators and strategy consultants who can use it to better plan their strategy workshops.

Six strategy workshops at a diesel engine company provide the empirical setting for our study, which is based on the research question: how can micro activities at strategy workshops be analyzed?

The paper is structured as follows: we first shortly describe the empirical context where the study was conducted, followed by a structured review of previous studies of micro activities at strategy workshops. In the method section, we introduce the method for coding of micro activity and explain the coding process that drove the analysis of this single-company multiple-case study. We continue to analyze the micro activities at the strategy workshops which we visualize with coding stripes and

code hierarchies from NVivo. We conclude that micro activities at strategy workshops can be coded by dissecting the second order codes into small clusters of references, corresponding to particular micro activities, which can reveal how the micro activities are interrelated, and we discuss the implications for qualitative methodology, researchers, and workshop facilitators.

Instrumental relevance through analytical praxis orientation

After decades of success and surging market shares, the diesel engine division of a multinational company faced a crisis: the order book started a downward trajectory. Market prognoses indicated to senior management that a strategic reorientation (Al-Ghamdi, 1998) was required. While developing the strategy, the diesel engine company found through an employee survey that it needed to solve complex organizational problems related to processes and cooperation in the complex matrix organization. The problems had accumulated over the booming years and were now obstructing the implementation of the new strategy and therefore needed to be resolved. The company thus needed to find a way to extract and exploit as much knowledge surrounding the problems as possible and apply it in new strategic, technological and organizational contexts. The workshop participants were to formulate and select actions that solved the problems while ensuring that the future actions had a high impact on the new strategy, which would be launched shortly after the workshops. The first six strategy implementation workshops, as they were labeled, were recorded on audio for the purpose of analyzing the micro activities at the workshops, so that future facilitators of workshops could optimize their workshop process. Therefore, this study aims to have instrumental relevance to facilitators of

strategy workshops and – through the applied analytical framework – conceptual relevance to qualitative researchers (Jarzabkowski & Kaplan, 2015; Seidl, 2012).

Previous studies of strategy workshop dynamics can guide practitioners' planning of strategy workshops: first, by showing that a strategy workshop can be conceptualized as a ritual with its removal from everyday surroundings, presence of liturgy and specialists (Bourque & Johnson, 2009; Johnson et al., 2010). Second, that strategy workshops have initiation, conduct, and termination phases where micro activities that stabilize or destabilize the strategic orientation can be identified (Jarzabkowski & Seidl, 2008). Third, that emotions such as 'drawing together' and 'driving apart' can affect the discursive activities at a strategy workshop (Liu & Maitlis, 2014). Fourth, that participants can interact visually with a strategy tool through (i) shifting away from contrasting positions toward a new collective understanding, (ii) inertia in accepting contrasting understandings, or (iii) assembly where the participants' knowledge is assembled in a non-conflicting manner (Paroutis et al., 2015). Fifth, that strategic discussion can be stimulated through knowledge sharing and activities that promote strategic consensus, and that it can be constrained if the workshop agenda is rejected and opposed by some of the participants (Schwarz, 2009). Sixth, that clarity of goals and purpose, regular occurrence (routinization), stakeholder involvement, and cognitive effort can have positive effects on strategy workshops (Healey et al., 2015). Finally, that the success of a strategy workshop is unaffected by the on-/off-site physical location, the number of managers, the duration of a workshop, and use of analysis tools; that a regular planning cycle leads to significantly more effective strategy development workshops, but not implementation workshops, compared to non-regular workshops; that urgent workshops are less successful than non-urgent workshops; and that the presence of a facilitator or

consultant has a negative effect on a strategy development workshop, but a positive effect on a strategy implementation workshop (van Aaken et al., 2013).

As a supplement to the previous conceptually oriented studies of strategy as practice, we present an approach to analyzing the micro activities at strategy workshops that is instrumentally relevant to practitioners who facilitate strategy workshops. Micro activities are here defined as “mundane” activities at the micro level “that constitute the actual doing of strategy” (Chia & MacKay, 2007, p. 218). By zooming in on the micro activities in play at a complex organizational event such as a strategy workshop, and analyzing how they are interrelated, we intend to provide guidance to a workshop facilitator in setting up a smooth workshop process that is goal-oriented in driving the workshop process forward while ensuring that problems or possible positive contributions are not dropped along the way.

Method

This study is a single-company multiple-case study (Yin, 2013). Combining multiple cases can make the findings and analytical generalization (Flyvbjerg, 2006) more robust (Yin, 2013, p. 57). Three workshops were held with Engineering Design departments where employees were highly specialized engineers responsible for the design of engine components. Similarly, three workshops were held with Engineering Operation departments where employees were marine engineers who performed the practical labor of repairing engines in service and ensuring their functionality. The first author planned and facilitated all workshops as insider action researcher (Roth et al., 2011): an insider action researcher has a dual membership and is simultaneously a member of the organization and a researcher. The role of the insider action researcher provides a unique opportunity to in-/decrease the contrasts of employee and

researcher, respectively, to act in practice while having the possibility to withdraw and reflect. The insider action researcher is thus immersed in practice, not only at the kind of events that ethnographers have previously described, but also the planning of those events. This involvement prior to the event may, we argue, result in novel contributions to methodological as well as strategy research.

Audio recordings were made at six strategy implementation workshops at the diesel engine company and subsequently transcribed, which resulted in 288 pages of transcript with a total of 123,448 words which were coded. The participants at each workshop were the department manager and his/her employees, in average 7.8 participants per workshop. All workshops had the same structure: (i) the strategy was introduced, (ii) problems were defined, (iii) solutions were sought, (iv) solutions were prioritized according to their potential impact on strategy, and one or more actions were selected for action planning, (v) an action plan was detailed, and (vi) the link to strategy was confirmed. Stages ii and iii were facilitated with interview technique from narrative therapy (White, 2007) which is a problem-oriented talk therapy where problems and associated solutions are ‘storied’ to enable the client to better map the problem’s influence on his/her life. By storying problems and possible solutions, they are transformed from abstract phenomena into experience-near and concrete ones. The problem-orientation of the workshop facilitation was chosen because of the contextual situation at the diesel engine company where structural and processual problems needed to be solved while aligning the resulting future actions with the new strategy. Another widely used interview approach is appreciative inquiry which, oppositely, amplifies strengths and builds on a perceived positive core (Stavros et al., 2003). The implemented workshop design was built on the recognition that narrative

elicitation of problems and associated solutions would support the workshop objective to align future actions with the strategy.

Because narrative interview technique was used to facilitate the strategy workshops, we decided to use a storytelling, theory-based, top-down coding strategy (see the code book in Table 1) based on the two storytelling genres 'living story' and 'antenarrative' and two expected results of using the narrative interview technique in a strategy workshop context, 'agency' and 'link to strategy'.

There are three storytelling genres. The first, 'narrative', is long-lived and appears petrified, i.e. it is told the same way time after time, and starts with a stable situation (beginning) which is somehow disturbed leading to a disequilibrium (middle) which is resolved leading to an end state which is similar to the initial state, but somehow changed (end) (Czarniawska, 2004). Narrative is chronological, retrospective and has emplotment (Boje, 2001) with a particular cast of characters: subject/hero, object, power/sender, receiver, helper, and opponent (Søderberg, 2003). Narrative, however, was not expected to occur in the strategy workshops focused on problems, future actions and their link to strategy, and therefore was not a second order code.

The second storytelling genre is 'living story', which is defined as an emotive story with story plots that entail "conflicts, predicaments, trials, coincidences, and crises that call for choices, decisions, actions, and interactions, whose actual outcomes are often at odds with the characters' intentions and purposes" (Gabriel, 2000, p. 239, original italics removed). Where a narrative is petrified and retrospective and does not change form as it is retold, a living story is an emerging story (Boje, 2008, p. 239) which is told in the present moment and can result in the attribution of agency (Gabriel, 2000, p. 39). Whereas a living story may be expected to occur in a problem-oriented workshop in the form of frustrations, agency can be expected to occur as the

Second order code	Minimal units	Criterion for exclusion
Living story	<ul style="list-style-type: none"> • Retrospective account of conflict or frustration, e.g. “the purchasing department was in charge of this, but they do not know anything about service orders, that we are taking care of, they do not have anything at all to with service orders, so they could not relate to our problem at all” • Retrospective account of action already taken to mitigate conflict or frustration, e.g. “so we had to find an SAP guy ourselves and then make a new system that could be used by everyone dealing with service [orders]” 	<ul style="list-style-type: none"> • No retrospective account of conflict/frustration • No retrospective account of action already taken to mitigate conflict/frustration
Antenarrative	<p>Expression concerning a possible future action that</p> <ul style="list-style-type: none"> • Includes a conditional conjunction, e.g. “if” • Includes an auxiliary conditional verb spanning from uncertain to almost certain, e.g. “could”, “can”, “should”, “would”, “must” • Describes a desired future state/its requirements/characteristics, e.g. “it requires that”, “it needs”, “maybe be better at”, “I would say once a month [on frequency of the action]”, “it’s perhaps also a very good idea that”, “it requires lots of resources and time unfortunately” • Is terse i.e. implicit/implied among the participants, e.g. “LDCL” (denoting the perceived troublesome process of developing and implementing LDCL technology), “cold corrosion”, “that 	No expression of possible future action/state uttered or implied

	time we had to get the [measuring device] home from the US”	
Agency	<ul style="list-style-type: none"> • Expression of volition to own one or a number of actions with known implications of increased personal workload, e.g. “Q: so you think that it is well worth the effort to develop it? A: absolutely” • Expression of volition to own one or a number of actions but recognizing that not all can be selected due to increased personal workload, e.g. “as I said we are all pretty pressed concerning tasks already so it is not because the desire [to perform the action] is not there” 	No expression of volition to undertake possible future action
Link to strategy	A participant pairs a possible future action with a specific part of the strategy, e.g. “Q: Have a look at your strategy here, where does it support the strategy to prevent fires rather than do troubleshooting? A: It is down in Increasing Profitability [super theme]. Q: Right, where exactly? A: Improve Effectiveness of Processes [sub theme]”	No explicit pairing of possible future action with specific strategy themes, topics, targets

Table 1. Code book

participants’ expression of intent to take action, and therefore both ‘living story’ and ‘agency’ were chosen as second order codes.

The third storytelling genre, ‘antenarrative’, is defined as a terse, fragmented, prospective “bet on the future” (Boje, 2014, p. 10). In a strategy context, antenarratives can be expected to occur as stories that are discovered when a problem is probed through externalization and made experience-near, offering new possibilities for action (Cai-Hillon, Boje, & Dir, 2011, p. 173). This was the desired

result of the strategy workshop and therefore antenarrative was also chosen as a second order code. Finally, the fourth second order code was ‘link to strategy’. Whereas the other second order codes were based on storytelling theory, ‘link to strategy’ concerns the desired effect of the workshop structure and indicates that, ideally, participants would be able to link any action they selected for implementation to the strategy.

References to the four second order codes were coded in the transcript. Analysis of workshop transcripts continued until conceptual saturation (Corbin & Strauss, 2008, p. 143) was reached. The thematic, or axial (Corbin & Strauss, 2008), second order coding was followed by coding of micro activity. Our coding of micro activity is similar to selective coding, where codes are selected based on their thematic patterns and sequences (Hays & Wood, 2011, p. 290) to enable the researcher to “generate a story that connects the categories” (Cho, Lee, Cho, & Lee, 2014, p. 8). We propose, however, that where selective coding remains at the conceptual theory-building level, coding of micro activities’ causal and temporal patterns can additionally generate insight to guide workshop facilitators’ action at the instrumental level. More specifically in our case study, and as displayed in the Analysis section below, each second order code in each workshop was given a name and a hierarchical number which enabled identification of causal (mother-daughter code relation) and temporal (before-after code relation) patterns of the second order codes.

Coding of micro activity is therefore a third order analysis of qualitative data that follows first and second order thematic coding after conceptual saturation is reached, and focuses on identifying causal and temporal patterns of the second order codes to enable instrumental insight based on an organizational event. Coding of micro activity, therefore, is a complication that can be added to conventional qualitative

data analysis to emphasize the micro activities in the data, i.e. praxes; in this multiple-case study: strategy praxis which is defined as “the flow of activity in which strategy is accomplished” (Jarzabkowski & Spee, 2009, p. 70). Although it prolongs the analytical phase, it enables the researcher to demonstrate visually how micro activities played out at the organizational event under scrutiny. Coding of micro activity thus consists of reshuffling, renaming and restructuring thematic codes based on their causal and temporal occurrence at the event. Instead of focusing on how concepts are thematically interrelated, as in selective coding, the focus turns to how they are causally and temporally related, i.e. what leads to what and when. The visualization that coding of micro activity enables may be instructive to practitioners by showing variations of micro patterns. By paying attention to the development of an event’s micro activities, insight into the practical usefulness of activities may be gained in effect leading to instrumentally informed decisions concerning when to proceed with the next workshop step and a better understanding of ‘what to expect’. In a strategy context, this supports the intention, from a strategy-as-practice perspective, to enhance the specialization of strategy practitioners (Golsorkhi, Rouleau, Seidl, & Vaara, 2015).

Analysis

In this section, we will analyze micro activities at six strategy workshops. We will show how we developed the micro codes and propose how they can enrich thematic coding by being instrumentally relevant to workshop facilitators.

The analysis started by identifying references in the transcript that could be assigned to the second order codes – the references were designated first order codes. During the analysis, the code book (see Table 1) was continuously refined. After data

saturation of the first and second order codes, coding of micro activity was initiated based on the first and second order codes. The intention was to show how problems, solutions, agency, and link to strategy were related. Therefore, the problems were the starting point for the analysis:

1. All problems were identified in the 'living story' code ('node' in NVivo) and each was labeled with a number (e.g. 1.).
2. Solutions that corresponded with each problem were identified in the 'antenarrative' code and clustered under the problem code in the form of a daughter code and given a decimal number (e.g. x.1).
3. A preliminary check of whether the solutions supported the strategy was made and if this was expressed by the participants, a secondary daughter code was made (x.x.1)
4. Instances of agency that corresponded with particular solutions were identified in the 'agency' code and made secondary daughter nodes (x.x.2)
5. Instances where the participants confirmed that a particular solution was linked to the strategy were identified in the 'link to strategy' code and made secondary daughter codes (x.x.3)

This hierarchy of micro codes from the workshop with design department 3 (pseudonym) is shown in Figure 1. The first problem that was elicited concerned design drawings with different taps which was confusing to the colleagues assembling the engines: why not just use one kind of tap? This problem was labeled '1.'. Two possible solutions were suggested, first (1.1), to make a guideline for taps, and second (1.2), to make a shortlist of components (not only taps) that could be standardized. Exploration of the root cause of a problem and associated impact mapping is built into narrative interview technique (White & Epston, 1990) and in

this workshop the participants discovered that what surfaced as a problem concerning different taps was really related with lack of standardization of components for the engines. This second solution was linked to strategy (1.2.1), the participants exercised agency (1.2.2) to implement the solution, and after detailing the solution in an action plan they confirmed the link to strategy (1.2.3). The second problem 'IT breakdown' (2.) was recognized by the participants to be beyond their control and influence and was therefore not pursued. The third problem concerned a lack of feedback from the participants' colleagues in the research and development department (3.). The solution to make 'calculation process sheets' (3.1) was identified to structure the calculation process which would enable the participants, who were from the design department, to know when they could expect the calculations from the colleagues in the R&D department. This solution was linked to the strategy (3.1.1), but was not selected for action planning. The fourth problem 'slow mock-ups' (4.) concerned the waiting time involved in making a mock-up design of a component and was thus related to slow computer processing speed. As with the second problem, this was deemed out of their control and influence and was not pursued. The fifth problem concerned slow sign-up for training courses (5.), and the solution to make structured, department-wide sign-up to courses was suggested (5.1), but was not pursued further. The sixth problem concerned routine tasks such as refinement of existing components versus developing new ones for new technology (6.). The proposed solution was to introduce volunteer rotation between design department 3 and other departments (6.1), and the solution was then linked to strategy (6.1.1), but was not pursued.

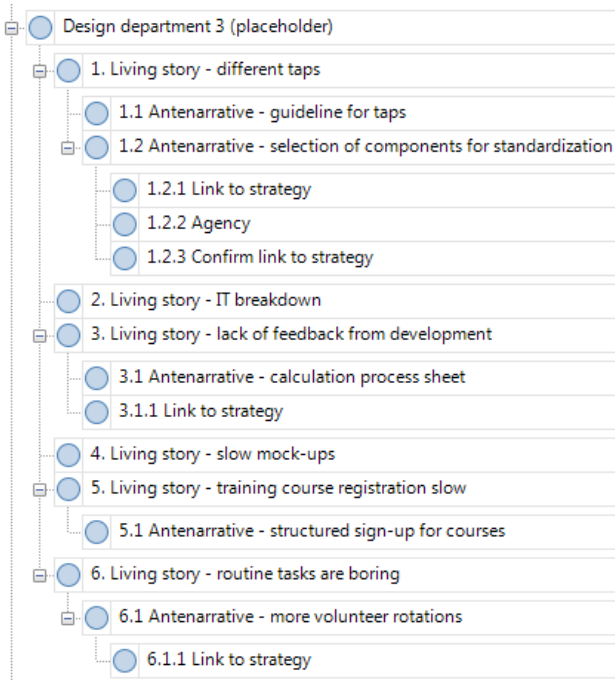


Figure 1. Coding of micro activity at the strategy workshop with design department 3, shown as hierarchy of codes

The analysis this far shows that the narrative facilitation technique works as intended in a strategy context: solutions to problems are identified, they are positively associated with the strategy that was introduced at the beginning of the workshop, and the participants express an intention to actually implement the solutions as suggested by narrative theory and practice (White, 2007). This finding is in itself relevant to strategy workshop facilitators: narrative facilitation in combination with this workshop process works to align future action with a strategy.

What the hierarchical view of the codes does not show, however, is how the micro activities occur over the duration of the workshop. This is a major weakness of conventional thematic coding: that it does not inform a practitioner of when a micro activity can be expected to occur at a workshop and therefore how to act, i.e. which questions to ask at what time, and whether to close down a discussion and move on. With this information, s/he could plan for a more efficient and effective workshop. The interrelations of the micro activities can, however, be visualized through the 'coding stripes' functionality in e.g. NVivo (see Figure 2; see the visualizations for the other five workshops in the Appendix).

Where the problem elicitation, solution finding, agency exercising, and linking of planned action to strategy micro activities appeared structured and sequential according to the code hierarchy in Figure 1, we can see a more complex relation between the micro activities in Figure 2, e.g. that problem elicitation was distributed over more than an hour interspersed with other micro activities. Although the workshop process was conceived as first eliciting problems and then moving on to finding problems, the micro activities became entangled and, presumably, mutually conducive, i.e. becoming more experience-near and mapping the effects of the problems enabled the elicitation of more problems on the one hand, and solutions on the other. A possible solution for the problem concerning different taps, for example, was discovered immediately after the elicitation of the problem, but the solution that was ultimately selected for action planning was discovered approx. 50 minutes later and after having discussed three other problems and one solution to one of the other problems in the meantime. Coding of micro activity at all six workshops in this sample showed that identification of solutions could also be distributed, i.e. a solution could be identified, other problems and their possible solutions could be discussed

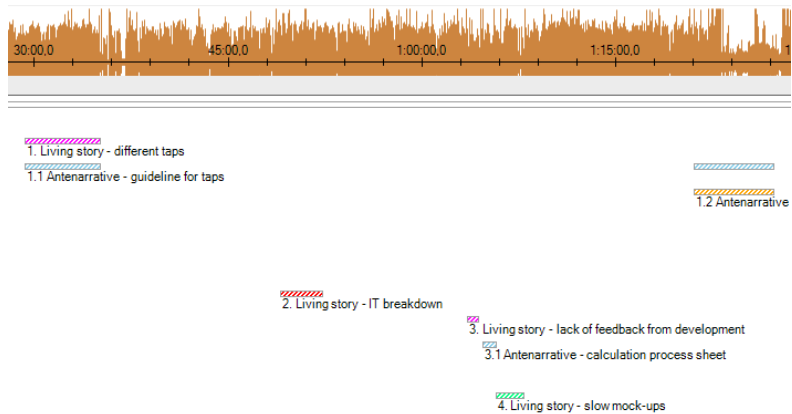
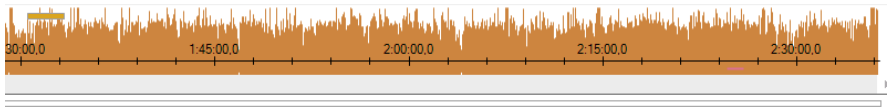


Figure 2. Temporal coding at the strategy workshop with design department 3, shown

and then the participants would return to the first solution. Likewise, participants could exercise agency and then later return to the future task and once again express their intention to implement the task and their ownership of the task. Finally, participants linked a future task to the strategy, moved on to discuss other issues, and then returned to and confirmed the link to the strategy.

Table 2 shows excerpts from the codes related to the ‘different taps’ future action. Combined with the visualization in Figure 2, it shows how a problem was first stated, how the solutions that the participants ended up selecting were identified 50 minutes later, how the link to strategy was identified another 40 minutes later, how



- selection of components for standardization



as coding stripes

participants expressed their intention to implement the task an additional 10 minutes later, and finally how they confirmed the link to strategy another 10 minutes later. In total, the five micro activities are distributed over a duration of 110 minutes, but the actual time consumption is approx. 20 minutes (the result of adding the duration of the coding stripes). This suggests that with narrative facilitation and this workshop design, participants can jump in and out of different lines of reasoning without losing track and understanding. This insight is instrumentally relevant to workshop facilitators. The references in Table 2 also show how the mutual understanding of the meaning of the various names for the future action is continuously negotiated.

Second order codes	First order codes: references (excerpt)
1. Living story → different taps	<ul style="list-style-type: none"> • AK (first author, as facilitator): because what is problematic here? • Oscar: [...] we don't communicate so much with each other • Alfred: that's why our engines end up working alright, but they can appear a little different [...] I had a [case] a while ago where [colleagues] came to me with some taps where we had [made] four different ways to make the curvature transition to the thread. They couldn't understand they needed five different tools and settings [for the same machining operation], they just wanted the same [procedure for all taps], and they might as well have gotten it [...] it would have been better for the customer if they were identical
1.1 Antenarrative → guideline for taps	<ul style="list-style-type: none"> • Oscar: we should probably have had a guideline there saying that when you get that sort of [question concerning use of different components] then you should do this and that • Alfred: that could very well be some of the things we could spend time on and make some of these guidelines [...] this example with the roundings on the taps, we should just look it up in the book of standards [...] • Charles: yeah [...] • Oscar: we could do something similar with the chain drive and [other components]
1.2 Antenarrative → selection of components for standardization	<ul style="list-style-type: none"> • AK: so what should I write on this [post-it used for documenting and visualizing future actions]? • Magnus: selection of components for standardization • Alfred: let's take it up on a team meeting - a critical review of • Charles: hereunder construction of the part and so on. The point of this is that we do things differently and it leads to irritation sometimes, right [...]
1.2.1 Link to strategy	<ul style="list-style-type: none"> • AK: so should [this future action] be called 'selection of components for standardization'? • Charles: that sounds right • AK: ok and impact [...] on strategy? • Alfred: [...] well it's about our internal quality and so it's related to [a section of the strategy related to 'customer

	<p>satisfaction’) and also if not our own profit, then the customer’s profit, if we make it cheaper to build an engine – we don’t make more money on that [...], but we get some customer satisfaction</p> <ul style="list-style-type: none"> • Oscar: [...] I think it’ll have a large impact [pointing: and thus should be placed above another future action] • Charles: yeah I also think it’ll have a big impact, but it involves a considerable work effort • Oliver: [...] I also think it is good if we put it there [at the top of a prioritization scale where the post-its are placed] now that we have heard the arguments
1.2.2 Agency	<p>[here participants choose among the possible future actions they had defined]</p> <ul style="list-style-type: none"> • Charles: ok well I’d like to switch to the one about standard parts • Oliver: I’ll take standard parts too • AK: [...] you went for standard parts too? • Oscar: yeah • AK: what do you two say? • Magnus: also standard • Charles: yeah standardization • AK: what do you two say? • Alexander: now no one dares to pick another one [laughter] • Magnus: I picked that one too • AK: [who will be the] owner? • Charles: can’t you write the department as a whole • AK: I could, but then I’d fear that no one would feel responsible • Charles: then write [representatives of the three teams of the department] • Oscar: I think we can write that the selection of parts should be done by December [...]
1.2.3 Confirm link to strategy	<ul style="list-style-type: none"> • AK: now I’ll ask you to place [the action] on the strategy [poster] • Oscar: that’s easy I think • Alfred: it sounds fancy but [the section on ‘customer satisfaction’] hopefully

- Magnus: it's also 'ensure high [...]
- Oscar: if you look at this [section on] customer satisfaction there's only one point that's directly related to [the engineering design department] and that's design quality methodology and design methodology and our action here [falls into that category] clear as a bell
- Alfred: yeah that's what we've just decided to do

Table 2. Excerpts from codes related to the problem 'different taps' addressed at the strategy workshop with design department 3

Figure 3 shows how many references were coded to each of the four second order codes. As could be expected from the workshop micro activities which focused on eliciting problems (the code 'living story') and finding associated solutions (the code 'antenarrative'), most references were coded to these two themes. References coded to 'agency' and 'link to strategy' occurred less frequently and were related to specific future tasks that were defined at the six workshops. In the corresponding micro code hierarchy, the number of references in each micro code spanned 1-4. As a rule, a reference included discursive interchanges related to the same micro activity, i.e. one reference typically include statements by several participants concerning the same topic. In thematic coding, one code with 1-4 references would be alarming and indicate that data saturation had not been reached. However, because coding of micro activity is conducted in addition to thematic coding, data saturation can be claimed in the conventional thematic analysis which is then dissected into small micro activities of 1-4 references each in the micro analysis.

	Name	References
+	Agency	25
+	Antenarrative	116
	Link to strategy	26
+	Living story	119

Figure 3. Second order codes and their references

Discussion

Micro activities at strategy workshops can be analyzed through a third order coding method that dissects second order themes into micro codes that can be causally and temporally visualized to expose the interconnections of the second order codes. This visualization and information, in turn, can be instrumentally relevant to practitioners who can take the dynamics linking the micro activities into consideration when they are designing a similar event. Although the strategy workshops consistently followed a preconceived workshop design with six phases, the micro activities showed that the workshop design was not consistently adhered to. Whereas the workshop was designed to elicit problems, then find solutions, then link them to strategy, then control for participants' agency, and finally confirm the link to strategy, micro activities occurred in a distributed pattern across the duration of the workshops. This finding emphasizes the importance of the facilitator in not conceiving the workshop as separate blocks of activity that need to be closed before moving on to the next, but rather as an interconnected whole. This finding places demands on the facilitator's ability to steer the workshop safely into harbor and ensure that the overall objective of the workshop is achieved. In this case, the facilitation technique was founded in narrative theory and practice where the therapist's position is described as being a

host (Aman, 2006) and fellow traveler (Gabriel, 2000, p. 32), thus as setting the frame and asking supporting questions, but not intruding on the cognitive and discursive processes taking place among the participants. This position emphasizes that the facilitator of a strategy workshop can advantageously dwell and linger upon participants' digressions from the workshop design as opposed to being very focused on, for example, wrapping up a problem definition and moving on to finding solutions. This study therefore suggests that a strategy workshop facilitator should allow space for meandering micro activities. Facilitators can advantageously familiarize themselves with narrative theory and practice to efficiently and effectively steer the process.

With this study, we propose to expand the locus of analysis in strategy-as-practice research. The locus of analysis in previous qualitative studies of strategy workshops is practitioners 'doing strategy'. This locus of analysis invariably leads to analysis of the themes that emerge as social practices. Thematic analyses of strategy practitioners exist "within the realm of methodological individualism" where individuals are agents and initiators of practices (Chia & MacKay, 2007, p. 226). In contrast to methodological individualism, we propose an ontology that is not based on social relations and the agency of the individual, but on practitioners' internalized practices as the real agents. In this ontology, the locus of analysis becomes micro activities in the form of strategy praxes that are inherent in various strategy practices (Chia & MacKay, 2007, p. 227). In this case at the diesel engine company, agency is the result of the micro activities at a strategy workshop as a strategic episode (Hendry & Seidl, 2003), and it was exercised because of the combination of narrative facilitation and the particular workshop design, not particular practitioners. Although it does not make sense to talk about strategy workshops without participants – no participants,

no workshop – the locus of analysis here is the micro activities as opposed to the participants. We propose that this may result in new knowledge about strategy that is instrumentally as well as conceptually relevant.

The case study method enables analytical generalization of micro activities at strategy workshops, but some limitations such as the possibility of analytical generalizations in other contexts, and the impossibility of statistical generalization, are intrinsic to the method and can guide future research. First, the coding of micro activity method proposed in this paper can be elaborated upon qualitatively, e.g. in other organizational and cultural contexts, and quantitatively, e.g. through factor modeling based on micro activities in experimental or quasi-experimental action research settings. Further, narrative interview technique itself can be tested independently from the workshop design for example in a public or non-profit context. Likewise, the workshop design can be tested independently from the narrative interview technique.

Acknowledgements

The authors wish to thank participants at the Strategy in the Nordics track at the 2017 Nordic Academy of Management conference in Bodø, Norway and Professor Torkil Clemmensen from Copenhagen Business School for constructive feedback on previous versions of this paper.

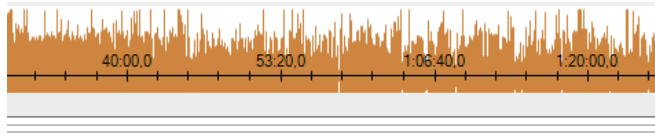
Declaration of conflicting interests

The author(s) declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding

This study benefited from grant no. 4019-0002B from Innovation Fund Denmark.

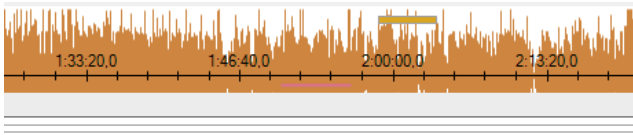
Appendices on the following pages



1. Living story - cracked top gallery

2. Living story - lack of time table leads to loss of quality

Appendix I. Visualization of coding of micro activity at the strategy workshop with



1.1 Antenarrative - make troubleshooting guide centrally available

1.2 Antenarrative - forced response calculations

1.2.1 Link to strategy

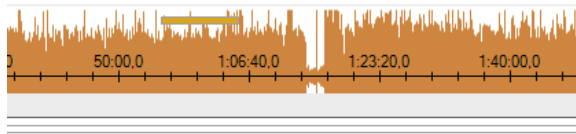
2.1 Antenarrative - make 3 guidelines (process descriptions)

2.1.1 Link to strategy

2.1.2 Agency

2.1.3 Confirm link to strategy

design department 1



1. Living story - lack of time for quality checks

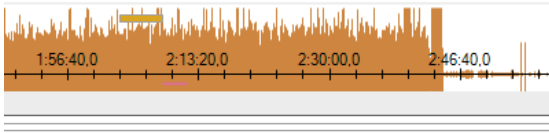
1.1 Antenarrative - allow time for design review

1.2 Antenarrative - be part of the project team from

2. Living story - the accident

2.1 Antenarrative - thorough

Appendix 2. Visualization of coding of micro activity at the strategy workshop with



- 1.1.1 Link to strategy
- 1.1.2 Agency
- 1.1.3 Confirm link to strategy

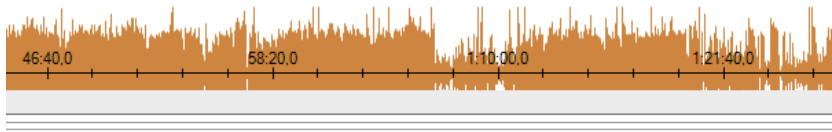
in the start

- 1.2.1 Link to strategy

review of accidents

- 2.1.1 Link to strategy

design department 2



1. Living story - introduction of the purchasing directive

1.1 Antennarrative - make a new purchasing department as part of the operations department

1.2 Antennarrative - make user-friendly automated service purchase order template

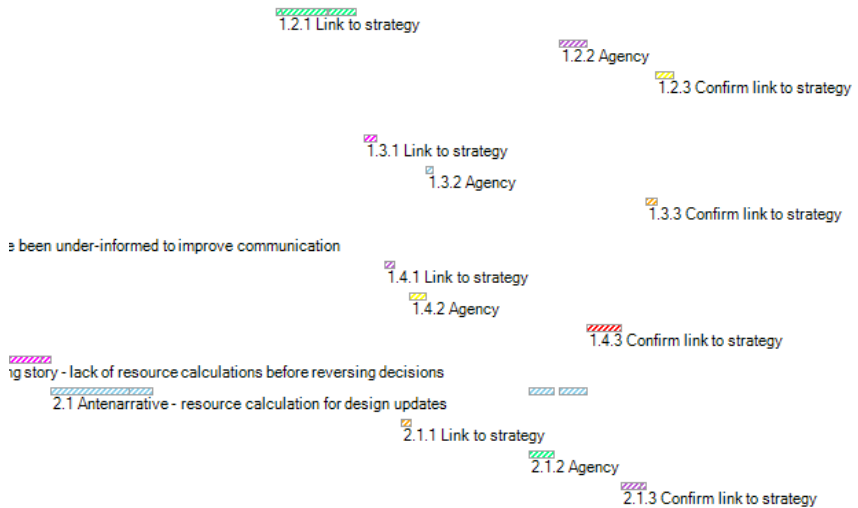
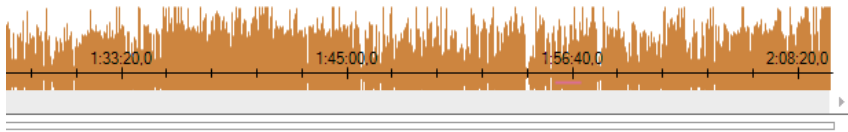
1.3 Antennarrative - enable sign-up to newsletter on system changes

1.4 Antennarrative - define areas where we have

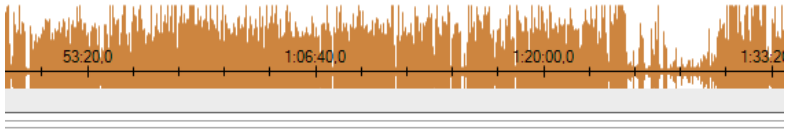
2. Livii

2. Livii

Appendix 3. Visualization of coding of micro activity at the strategy workshop with



operation department 1

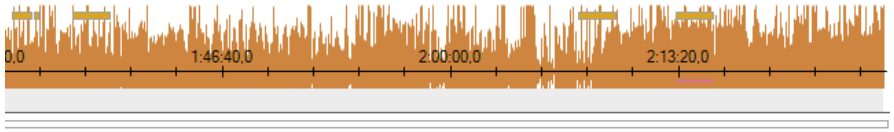


- 1. Living story - distribution of tasks
 - 1.1 Antenarrative - monthly department meetings

- 2. Living story - people working on the same task
 - 2.1 Antenarrative - managers to define distribution of tasks

- 3. Living story - manager distributes tasks at one-on-one meetings
- 4. Living story - man-hours on dual-fuel engines are not prioritized
 - 4.1 Antenarrative - early involvement in development projects
 - 4.2 Antenarrative - specify handover from department to

Appendix 4. Visualization of coding of micro activity at the strategy workshop with



1.1.1 Link to strategy

1.1.2 Agency

1.1.3 Confirm link to strategy

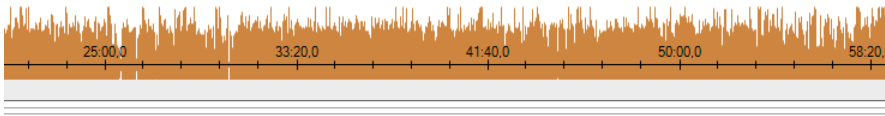
2.1.1 Link to strategy

2.1.2 Agency

2.1.3 Confirm link to strategy

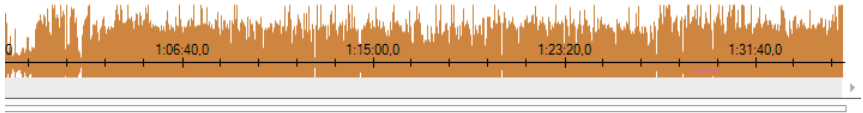
› department

operation department 2



- 1. Living story - no reaction to feedback
- 2. Living story - too little time for immersion
- 3. Living story - too little time for documentation
 - 3.1 Antenarrative - prevent fires rather than firefighting - prepare documentation that can be reused
 - 3.1.1 Agency
 - 3.1.2 Link to strategy
- 4. Living story - others' and own expectations
- 5. Living story - purchasing system

Appendix 5. Visualization of coding of micro activity at the strategy workshop with



for easy troubleshooting e.g. parameters, procedures, manuals



3.1.3 Confirm link to strategy

operation department 3

5. Discussion of results and implications

With the empirical papers, I have broken down the overall aim of the study into distinct elements, each addressed in the single papers, resulting in a very specialized representation of the data (Oxley et al., 2010). I have thereby tried to make the papers instrumentally relevant to reflective practitioners which, as mentioned in the Introduction chapter, I found lacking before I embarked on the Industrial PhD study myself. The empirical papers seen as a whole indicate that employees' future actions and company strategy can be aligned in a resource-scarce organization – this was the first part of the overall research question in this study. The collected data also indicate some interesting mechanisms in connection with the second part of the research question, concerning *how* the alignment of future actions and strategy works. Where the papers have an instrumental and methodological perspective, this chapter will add a conceptual perspective to the research question and address 'the how'. First, I will discuss how each of the strategy implementation workshops can be conceptualized as a ba. Second, I will refine and contextualize the model of knowledge creation in a strategy implementation context that I proposed in the Theory chapter. Third, I will discuss the implications and limitations of this study concerning blurring the line between deliberate and emergent strategy approaches, doing insider action research in a strategy context, and proposing future research directions.

5.1 Conceptualization of a strategy implementation workshop as a ba

Returning to the literature review of ba studies in section 2.3 *Knowledge mobilization in a strategy perspective*, the authors of the studies did state that they identified ba's in their various contexts. Some of the studies simply state that a ba exists, not drawing on empirical examples:

In Figure 6 we have shown the types of firms and units participating in a biopharmaceutical network, collaborating within and across firm and industry boundaries and each forming separate knowledge contexts. Thus, as each box forms a Ba, there are multiple ontological dimensions within each box or Ba and together these form a networked biopharmaceutical Ba, which in its simplest form can be seen as a community, but which for the purpose of new knowledge creation should become a Ba. (Brännback, 2003, p. 35)

Other studies exemplify through quotes from transcripts, e.g. “[i]nformation sharing is quite informal, it is usually done before and after the assemblies in which the associates are present” which was stated in an interview (Balestrin et al., 2008, p. 101). I will follow the latter approach and exemplify the existence of ba's through transcript quotes.

The four conditions that enable a ba were mutual trust of participants, exchange of diverse knowledge, application of the elicited knowledge, and a clear set of objectives for the ba (Choo & Neto, 2010, p. 604) and a ba can work as a strategic episode that operates detached from the organization's normal production schedule (Hendry & Seidl, 2003). Table 5.1 shows examples of the four ba-enablers in the transcripts in addition to pointing out some examples of how the participants

expressed that the workshops were detached from the organization's usual deadline-oriented temporality.

Conditions that enable a ba as a strategic episode	Quotes from the transcripts
Mutual trust of participants	<ul style="list-style-type: none"> • Anders: so what situation are you thinking about? • Paul: well it's obvious to take a current case so I'll do that [about a particular engine type] • Christopher: you could also pick something about cooperation [with a particular department] • Paul: [laughs] yeah well that's also very current huh • Knud: there isn't any solution [to that] • Christopher: that's why I think it might be interesting • Paul: well I don't think so [...] • Christopher: not in the early morning • Paul: no and absolutely not this way [...] I'd feel better about it if I spoke with the people first rather than talking about it in front of others before I have a possibility to debate it with the people it involves [...] • Christopher: but this is a top secret research project [people laugh] and Anders is a coach and can't talk about it [afterward] • Anders: yeah you came late for the start-up briefing [Paul joined the workshop 10 minutes late], but I'm recording this because I need it for my phd project [...] no one here at the company will hear [the sound recording] and [the transcript] will be anonymized • Paul: ok well [then] we can talk about that case [concerning problematic cooperation with the particular department] and probably more people [here] will have an opinion about it [so it might make sense to dig into it]
Exchange of diverse knowledge	<ul style="list-style-type: none"> • Robin: well we only arrived at [the planned actions] because we did that [pointing to flipcharts on the wall with notes from the stories that were commented by the participants] so it's our

work process and our workday that's there [on the action plan, also on a flipchart]

Problems	Solutions
1. Cracked top gallery	1a. Making troubleshooting guide centrally available 1b. Forced response calculations
2. Lack of time leads to loss of quality	2. Make 3 guidelines (process descriptions)
3. Lack of time for quality checks	3a. Allow time for quality review 3b. Be part of the project team from the start
4. The accident	4. Thorough review of accidents
5. Different taps	5a. Guideline for taps 5b. Selection of components for standardization
6. IT breakdown	
7. Lack of feedback from development	7. Calculation process sheet
8. Slow mock-ups	
9. Training course registration slow	9. Structured sign-up for courses
10. Routine tasks are boring	10. More volunteer [job] rotations
11. Introduction of the purchasing directive	11a. Make a new purchasing department as part of the Operation department 11b. Make user-friendly automated service purchase order template 11c. Enable sign-up to newsletter on system changes 11d. Define areas where we have been under-informed to improve communication
12. Lack of resource calculations before reversing	12. Resource calculation for design updates

	<p>decisions</p> <p>13. Distribution of tasks</p> <p>14. People working on the same task</p> <p>15. Manager distributes [and re-assigns] tasks at one-on-one meetings [without informing the previous task owner]</p> <p>16. Man-hours on dual-fuel engines are not prioritized</p> <p>17. No reaction to feedback</p> <p>18. Too little time for immersion</p> <p>19. Too little time for documentation</p> <p>20. Others' and own expectations</p> <p>21. Purchasing system</p>	<p>13. Monthly department meetings</p> <p>14. Managers to define distribution of tasks [across two departments]</p> <p>16a. Early involvement in development projects</p> <p>16b. Specify handover from department to department</p> <p>19. Prevent fires rather than firefighting – prepare documentation that can be reused for easy troubleshooting e.g. parameters, procedures, manuals</p>
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Application of the elicited knowledge

- Oscar: it was good that you presented [the strategy] in the beginning [of the workshop] or else we would have independently found some targets and then later embossed them into the strategy, but it is intended that the strategy influences our choice and that's the whole point of the strategy [...] I believe that strategy should guide us in a direction and [we shouldn't] fabricate [Danish: finde på] a lot of things and then later try to push them into the strategy, it should be the other way around, the strategy should lead us in a direction

	<ul style="list-style-type: none"> • Theodor: it's been fun to specify [processes] a little more [...] how we'll get there [the objectives of the strategy]
Clear set of objectives	<ul style="list-style-type: none"> • Noah: I'd say that you [speaking to the facilitator] coming here with your [workshop] method corresponds well with what we generally need: a systematic approach to getting some truths out in a fairly complex situation right
Strategic episode	<ul style="list-style-type: none"> • Magnus: [at this workshop we] perhaps vented our aggravations • Alfred: and frustrations • Valdemar: we have gone in-depth • Henning: [the workshop has been] one word inspiring or • William: or reflection [...] I think • Henning: [...] you're [we're] sort of [...] psyched or pumped and now we're going out to save the world and then an hour later we're back where we used to be, but you sort of feel that we're going to go out and really do something about it-ish • Lucas: [having the workshop] has forced us to talk about some of the things that frustrate us on a daily basis [...] it's required that we sit down, as we've done now, and forced us to think about it, right, and I think that's pretty good • Noah: it's good that [the workshop] starts with strategy because it sort of pulls our focus out of our own department and upward • William: I also think it's great that someone from outside is coming to facilitate [the workshop] because we could have gotten to the same result, but we would not have done it as effectively [Danish: effektivt] and I probably wouldn't have pulled three hours out of the calendar [...] now we're here and concentrate, right [...], you've kept us at it until the bag was tied [...] I think it was really good so yeah I feel that something concrete came out of it

- Maria: you ask another kind of questions than we would have been able to, you may see things differently that we do, we are perhaps a little more practical in relation to our work, right, and you see it a little more from the outside [...]
- Per: definitely, it also gives a certain focus that, well, we focus on this for otherwise we would really quickly talk about [...] nuts and bolts and why the hell the characters [in other departments] [people laugh]

Table 5.1. Selected quotes that describe the ba-enabling conditions as well as strategic episodes from the strategy implementation workshop transcripts

The quote exemplifying the ba-enabling condition ‘establishing mutual trust’ shows how Paul started out wanting to talk about a particular ongoing design task, but is persuaded by Christopher to talk about a recent problematic cooperation with colleagues from another department. Paul first resists talking about the problematic cooperation, but ultimately agrees. A very intense account of the cooperation followed, which became the longest and most detailed account at the workshop. The selected quote shows that trust already existed in the relationship between Paul and Christopher – otherwise Christopher could not have proposed a completely different event – and that trust and confidentiality enabled the participants at this workshop to share, comment and challenge each other’s sensitive accounts of events. Therefore, trust is a key feature of the creation of a successful ba and a key factor to take into account in transferring the workshop format to other contexts. This workshop format can be expected to achieve the best results in a context where employees already know each other well.

The ba-enabling condition ‘exchange of diverse knowledge’ is difficult to demonstrate empirically in short form. Through Robin’s quote and the list of all

problems and their associated possible solutions across the workshops, I provide an impression of what sort of knowledge exchange was exchanged at the workshops. In his quote, Robin points out that the action planning could not have been done were it not for the stories that were shared. The inserted table below Robin’s quote shows the diversity of the problems and solutions. The numbers of problems and solutions correspond, i.e. two actions were proposed (1a and 1b) as solution to the first problem. Solutions were not found for all problems, hence the empty lines in the solutions column. Across the workshops in this case study, different types of problems and solutions were formulated: the problems were related to technical issues, resource consumption such as time and manpower in relation to quality, safety, IT systems, cooperation, the essence of engineering work itself, compliance with corporate guidelines, and general management. The solutions that were identified included making guidelines, actions by the department manager such as to allow time for quality review in the resource planning, collective decisions what would enable particular lines of action, and more complex ideas that involved several departments. Categorized according to the dimensions that impact strategy implementation (Galbraith, 2014), the problems and solutions can be clustered in the structure dimension and the processes dimension. No problem or solutions can be placed in the rewards or HR policies dimensions.

Concerning the enabling condition ‘application of the elicited knowledge’, it was part of the workshop design to first elicit knowledge about problems, then to identify possible future actions which were prioritized and selected according to their relative impact on the strategy, and then make plans for action. The application of the elicited knowledge was therefore an integral part of the workshop design as Oscar comments in his quote. What Theodor refers to as specification of processes can also, in my

reading and experience at the workshop, be interpreted as application of knowledge. He talks about how processes needed to be specified – through elicitation – and how the objectives of the strategy can be met through subsequent action planning. In order for this process to take place at the workshop, the knowledge needs to be applied by co-creating it, interpreting it, being critical about it, and by dealing with it.

The ba-enabling condition ‘clear set of objectives’ was established through the workshop design as Noah points out in his quote. He refers to the workshop method as a systematic approach that enables the participants to deal with a complex situation. With systematic workshop method, he refers to the workshop design with six steps: the participants were briefed about the workshop design in the facilitator’s introduction, and the current workshop step was always shown on the presentation screen that served as documentation tool throughout the workshop. These measures helped establish a clear set of objectives.

Finally, the quotes show that the workshops were in fact perceived by the participants as a space that was detached from the organization’s normal production schedule where they could vent frustrations, go in-depth, and concentrate through facilitation and then go back to their desks and rejoin the organization’s usual temporality. The quotes also point to the occurrence of a reorientation of attention in terms of how employees relate to the strategy, e.g. by pulling the participants’ focus upward, by providing a new perspective, and by refocusing their understanding of the connection between future tasks and the strategy. The workshop itself, i.e. the three-hour meeting invitation in the email and calendar IT application Outlook and the physical meeting room, provided the space and the facilitator and interview technique provided the method as was shown in Nonaka’s original model (see Table 2.5, left column).

Category in narrative therapy	SECI sequence	Questions asked by the facilitator at the workshops
Formulating an experience-near and particular description of the problem or solution	Externalization	<p>Assign headline</p> <ul style="list-style-type: none"> • What words could you use to describe it? • If you should give it a headline, this frustration you have when you tell this story, what's the headline - how can it be summarized? • What can you call it? This thing about having it under control before we start [...] • Ok so procedures for... what can we call it? • Ok so what was your idea? Something about automation - what would you call it? I'll write it up here • So what could you call this thing - what could it be? <p>Give example</p> <ul style="list-style-type: none"> • So if we start with the first problem, about having the necessary resources and information, who can tell me about a specific situation where it was a problem that you didn't have the necessary resources and information? • Can you give a specific example of that? • Can someone talk about a situation where it's been problematic? • So now I'll ask if somebody can tell me about a situation where you either work efficiently or where you are prevented from working efficiently or something in connection with quality? • Try to give me a specific example from

		<p>your work of something you did that made you think “if only I’d have had more time, maybe I could have worked my way deeper into the issue to assure the quality”?</p> <ul style="list-style-type: none">• Can one of you give me an example of when you have given feedback to someone?• Can you give an example of something you’d have liked to work with in depth but that you were prevented from doing?• Can you come up with a specific example of something that could be frustrating in connection with leader behavior?• Try to give an example! <p>Specify</p> <ul style="list-style-type: none">• When did that last happen?• And it took two months?• What’s fun about development tasks?• Who sets the deadline?• What would that kind of guideline describe?• What is an FMA?• And you didn’t do that or what?• Where does the document land when you send it? Whom do you send it to?• Have you tried that?• So what is it you’re missing? <p>Check for more</p> <ul style="list-style-type: none">• Can you think of anything else in connection with lack of information or processes or guidelines that is annoying?
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		<ul style="list-style-type: none"> • I think we have touched upon the issues we started out by selecting, but is there something we haven't talked about that you experience as really annoying, that we might as well talk about now? • Are there more elements to this frustration or have we covered it roughly now? • Are there any more frustrations?
Determining the effects of the problem or solution	Externalization	<ul style="list-style-type: none"> • So what would you say is the effect of the short term solution and what's the effect of the long term one? • What is it for your part that you feel you haven't had a deep enough dive into because of the time pressure? • Some of the things you mentioned here (if the borings were right, measurements were lacking on the drawings, a missing drain valve, the areas hadn't been verified) – what are the effects of these issues in relation to the construction of the engine? • What will you gain from knowing that? • What are you being prevented from doing there? • What does it lead to for you? • What would you be able to get out of it? • What would you be enabled to do if you had that sort of documentation? • So if you get them described, what would you be capable of doing that you can't do now? • What would you be able to do if you were part of it earlier?
Discovering what's	Externalization	<ul style="list-style-type: none"> • When you say you like the intensity in

important about the problem or solution		<p>the task what's important to you in it? And what to you gain from having this intensity and solving tasks this way?</p> <ul style="list-style-type: none"> • Now that they're irritating, what is it that's important for you in your work? What would you like to do or achieve? • So what is it that's important to you? To be told the truth or...?
Search for solutions	Combination	<ul style="list-style-type: none"> • What could you do that would ensure that deadlines would not be postponed? • How could you take the time to show it to other departments and get their opinion on what the possible issues might be? • What could you imagine yourselves doing in this connection to minimize your frustrations? • What could you do? What would you suggest? What are your wishes? • What could be the action from your side to make them aware of it?
Eliciting link to strategy	Combination	<ul style="list-style-type: none"> • Does it have a small or big impact on the strategy you see in front of you? • How do you think it supports [various elements of] the strategy? • So somewhere up here [pointing to the prioritization scale of 1-10 equaling small and large impact on strategy]? • So down here somewhere? • So it's around there together with the other [action]? • Is that one of the tasks [of the strategy] that's already running? • Is this about customer satisfaction [which is a theme that is detailed in the

		<p>strategy]?</p> <ul style="list-style-type: none"> • So should it be placed there? • Even higher? • And so the part of the strategy we are talking about here is quality [which is detailed on the strategy], right? • So right in the center? • Above average?
Eliciting agency	Combination	<ul style="list-style-type: none"> • So who's the owner? [...] that means you? • What about the definition of what is to be reviewed – who will write the definition? • So you choose [to own the task concerning definition of] standard parts? • Who wants [task]? • So you want to take that? • So you want to take both [tasks] on? • Who will call in for the first meeting [that is part of the solution]? • So you think it would be worthwhile developing it? • So this action that you've talked about that involves different things but mainly is about preventing fires rather than doing firefighting [Anton: yes] do you all think it is a good idea to do this? And do you want to proceed with it and make it more specific? • Who'll be the anchorman?

Table 5.2 Facilitator's questions cited from the workshop transcripts, clustered according to the interview categories in narrative therapy (White, 2007) and the SECI sequence

Nonaka's knowledge creation model included three elements: ba, moderator and the SECI sequence (Nonaka et al., 2000). The ba and the facilitator were discussed above. Whether the SECI sequence took place at the workshops is demonstrated in Table 5.2. The table shows 69 verbatim questions from the workshops, clustered according to White's (2007) question categories and compared to Nonaka's SECI sequence. In my reading of White's interview maps, the questions in the table are highly correlated with White's approach and 'externalization' and 'combination' in Nonaka's SECI sequence – 'socialization' precedes the workshop and 'internalization' follows the workshop. I posit that the EC part of the SECI sequence took place effectively at the workshops, and that interview technique from narrative therapy was instrumental in mobilizing knowledge. Further, based on clinical research of the long-term effects of narrative therapy in a therapeutic context (e.g. Vromans & Schweitzer, 2011), I propose that the action plans developed at the workshops have an ideal starting point because they are co-developed by the participants as solutions to perceived problems, they are linked to the strategy, and agency was exercised to undertake the actions. As emphasized in the Method chapter, the methodological choice to limit this study to the workshop situation was made to allow an in-depth study of the workshop situation itself at the expense of action implementation that other studies have focused on.

The effect of the knowledge mobilization process that occurred at the workshops was captured by Charles in an evaluation of his workshops:

Charles: it's sort of like the [four strategic focus areas] are these balloons that are high up in the air so we can't reach them, but we've gotten to a point where you can pull them down [...] I can make more sense of [the strategy] [...] I can look at this [strategy] and pinpoint some places and then say 'this is where

we've worked [to support the strategy]' [...] I suppose it's what ultimately keeps the company going, right, that we have some strategies and [...] fulfil our targets [...] but this [workshop] has been very clever [Danish: meget smart] and then there was the whole exercise about linking some of the targets we plan to do to this [strategy], like we did at the end, so somehow it becomes more tangible to us, some of these targets, right [...], we've previously been asked if we feel some sort of relation to the company's targets and strategy and stuff like that and this consolidates it, right [Danish: samler det], you get a little into it I think

Charles, a design engineer in an Engineering Design department, describes how strategy was abstract for him when he entered the workshop and experience-near when the workshop finished. By using the balloon metaphor, he explains how he has now mobilized knowledge to generate a sufficient understanding of the company's strategy to interpret it in light of his everyday actions. Metaphors, like Charles' balloon metaphor, have been found to justify decisions and actions by validating some accounts over others (Cornelissen, Holt, & Zundel, 2011, p. 1706), and in the quote, Charles validates not only the strategy, but also the workshop process, by expressing that the changes that the strategy represents are desirable, proper and appropriate in light of his normal working tasks (Cornelissen et al., 2011, p. 1706). Therefore, the expression of the metaphor marks not only the beginning of Charles' interpretation process, but that is has already started (Crossan, Lane, & White, 1999, p. 527). Hislop (2013) characterizes a dialoguing⁴ ba as a shared space where people "can articulate experiences to each other via metaphors" (p. 112), and therefore I

⁴ Hislop (2013) uses an alternative nomenclature and calls it "interacting ba", but he refers to the same notion as what I have labeled a "dialoguing ba" based on Nonaka's work (Nonaka et al., 2000).

maintain, based on this experiential evidence, that the strategy implementation workshop can be conceptualized as a ba.

5.2 Model of knowledge creation in a strategy implementation context

The empirical findings seen across all workshops and all papers support and enable refinement of the theoretical model I proposed in the Theory chapter. This enhanced model (see Figure 5.1) shows that a strategy implementation workshop can be a strategic episode (Hendry & Seidl, 2003) that operates in an alternative temporality where the depth and intensity of the workshop experience are increased, also enabling a refocusing of perspective, i.e. orientation in space ‘upwards’ to the strategy and ‘downwards’ to the daily tasks – and putting the two in perspective and linking them in the minds of the participants. The company’s rushed, delivery-and-deadline orientation seems to ‘slow down’ because the participants are invited into a space where the focus is on reflection, interpretation and process rather than performance, and are encouraged to dwell⁵ in the moment (Chia & Rasche, 2015). Before the workshops begin, the participants’ knowledge is socialized and tacit (Whyte & Classen, 2012). And when the originating ba is created at the beginning of the workshop, the strategy appears abstract to the participants. When the dialoguing ba is created through interview technique from narrative therapy, the tacit knowledge is externalized (White, 2007; White & Epston, 1990). When the systematizing ba is created through application of the just-externalized knowledge, knowledge is combined and the process of combination enables the participants to reconceptualize and reinterpret the previously abstract strategy in an experience-near manner.

⁵ Dwelling at problems and frustrations as opposed to “building on existing strengths and profitable opportunities” (Stavros et al., 2003, p. 7) distinguishes narrative inquiry from appreciative inquiry which is a major interview approach in organization development.

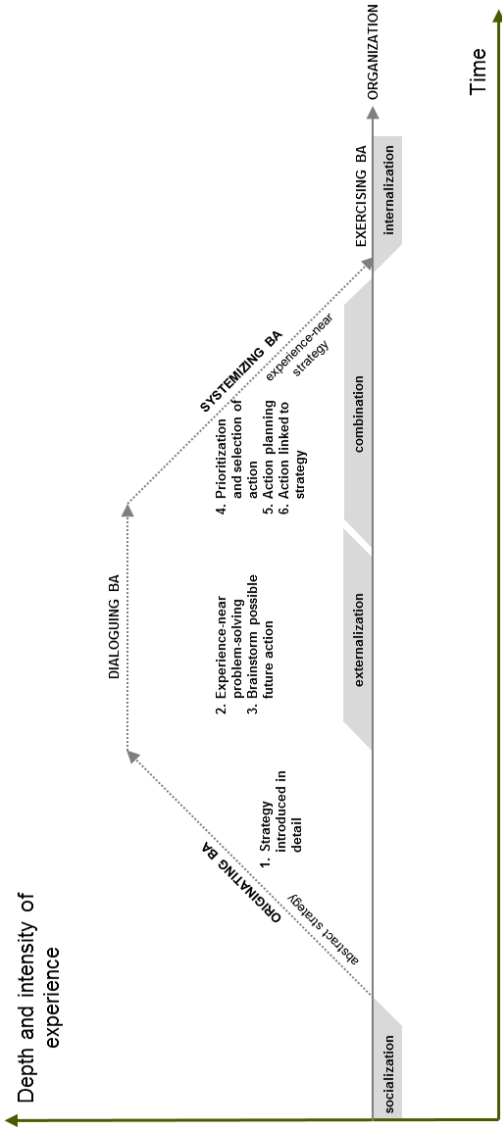


Figure 5.1. Knowledge creation at a strategy implementation workshop as a strategic episode

Following theory on knowledge creation (Choo & Neto, 2010; Finley & Sathe, 2013), I propose that an exercising ba is created at the end of the workshop. This proposition, however, rests on theoretical assumptions, not empirical findings in this study.

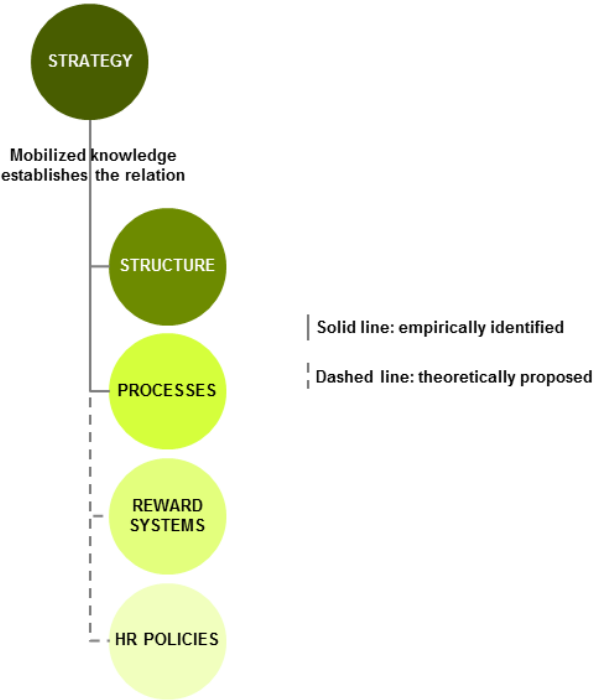


Figure 5.2. Aligned organizational changes after the strategy implementation workshops at the diesel engine company

The workshop format proposed in this study can thus be seen as a way to introduce process ba's, or spaces, into performance- and goal-oriented company contexts.

Where space defines “the relations between social positions, structures and practices and thereby also their meanings, for example, what constitutes us and them, close or distant or good and bad” (Blasco, 2015, p. 119), the space provided with this workshop format allows employees to acquire a new perspective of top management’s intentions and brings them closer together through a process of understanding that is detached from the company’s usual goal orientation. Whereas in the goal orientation, the organizational space is characterized by a distant relationship between employees and top management, after the workshop this changes to a closer relationship, characterized by a process orientation, because employees have come to understand top management’s intentions with the strategy, cf. Charles’ quote above.

The organizational effects of the strategy implementation workshops at the diesel engine company partially supported the theory on alignment of organizational change (see Figure 5.2). Recalling the dimensions that can be managed to successfully steer organizational changes in connection with strategy implementation (Galbraith, 2014), the workshops established relations between the dimensions of strategy and structure, and strategy and processes, not strategy and reward systems, and strategy and HR policies. There are two obvious reasons for the absence of problems and solutions related to rewards and HR policies. First, the rewards system is not decided by the company itself, but by its owners. Second, knowing this, the facilitator introduced the ‘circle of control’, the ‘circle of influence’, and ‘conditions’ if discussions were turning toward conditions that could not be dealt with at the workshop. In short, the circle of control describes what can be directly controlled, i.e. actions by the participants in the workshop; the circle of influence describes processes and decisions that cannot be controlled, but still influenced by the participants; whereas conditions are given in a specific context of which the participants have no control or influence,

e.g. systems and legal directives (Covey, 1989). Rewards and HR policies fell into the latter category, conditions, which could not be effectively dealt with at the workshop and therefore attention was deliberately turned to the relations between strategy, structure, and processes. Although the empirical context precluded the participants from addressing rewards and HR policies, I propose that the same kind of workshop can facilitate the establishment of relations from the dimension of strategy to rewards and to HR policies, respectively, provided that the participants have decision power and can effectuate actual change in the dimensions. This, however, is beyond the scope of this study and remains to be explored in future research.

5.3 Implications, limitations and directions for future research

In this section, I will discuss three implications of the findings of this Industrial PhD study: first, the implications of softening up a deliberate top-down strategy implementation approach with elements from the emergent strategy approach in the form of an enhancement of the knowledge creation model. Second, what the implications of the findings are for the strategy-as-practice research field. Third, I revisit the limitations that are built into this single company multiple case study and show how I have addressed some of the limitations via follow-up studies. The remaining limitations represent possibilities for future research.

5.3.1 Introducing elements from the emergent strategy approach in the deliberate strategy approach through enhancement of the knowledge creation model

The deliberate approach to strategy has been criticized for decoupling thought from action when a strategy is first developed and then implemented, as well as the dominating role of the CEO or the top management team as the grand designer(s) of

strategy (Mintzberg, 1990, 1991; Mintzberg et al., 2005). The emergent strategy approach on the other hand has been criticized for not being based on knowledge of practice of strategic management and for failing to specify the relevance of context, or environment, for a strategy approach and instead maintaining its universal applicability (Ansoff, 1991; Liedtka, 2000). I want to focus on two aspects in the discussion of the planned versus the emergent strategy approaches that I find particularly relevant in connection with this Industrial PhD project: the time aspect in connection with strategy development and implementation and its implications for choice of strategy approach, and for the associated possibilities for clarity of the strategic objectives the two approaches enable. In discussing the time aspect of strategy implication and the possibilities for clarity of objectives, I propose a reconceptualization of the deliberate and emergent strategy approaches where they can supplement each other at a crucial junction in the strategy process.

The major strategic choice that differentiates the deliberate and emergent approaches to strategy is that the former separates strategy development from strategy implementation, as already described in the Theory chapter. A deliberate strategy approach was the selected strategy process at the diesel engine company. The transition from developing a strategy to launching it to the organization is a crucial point in time where the strategy goes from being known to top managers to being known by the entire organization (Noble, 1999). Let us zoom in at what actually happens at this junction in time which is when the data in this study was collected: i) the strategic objectives have been described, preferably with great clarity (Liedtka, 2000, p. 27), ii) the strategy text (Fenton & Langley, 2011) has been developed and print or other physical material has been or is being prepared for the strategy launch, iii) a media or communication plan is or is being prepared for the launch, and iv) any

immediate obstacles to the strategy implementation have been, or are being, dealt with (e.g. Alexander, 1985). This means that the junction in time where development ends and until implementation starts is not a singularity, i.e. a one-dimensional point of infinitely small space and duration, but a period that stretches over a number of, most probably, days or weeks.



Figure 5.3. The strategy pre-implementation phase (dotted line) in a deliberate strategy approach

The period of limbo between strategy development and strategy implementation can be used for preparing the organization for the impending strategy implementation. This pre-implementation phase is different from the strategy development phase because the strategy formulation has now been fixed and has materialized into the strategy text. It is also different from the strategy implementation phase because the strategy has not yet been launched on an organizational scale. The pre-implementation phase is therefore characterized by punctuation (Bartunek, 2016, drawing on a music metaphor), or a pause where strategy development activities are finished and implementation activities await. The strategy pre-implementation phase has not formerly been described in strategy literature which focuses on development and implementation, either as a punctuated sequence or a continuous whole (Klarner & Raisch, 2013), but it can be empirically identified by an insider action researcher who follows the strategy process from start to finish. I propose that the strategy pre-implementation phase presents a unique possibility to prepare the strategy implementation in a way that the strategy development phase does not enable because the strategy is still being developed.

In connection with a strategic reorientation, as a common type of organizational change (Al-Ghamdi, 1998), the short pre-implementation phase can for example be used to develop a strategy implementation workshop design (see the empirical paper on iterative prototyping in this dissertation). In a psychological perspective, the pre-implementation phase can be used to start to understand how employees can make sense of the past, present and future in the particular empirical context, to best enable them to understand the effect of the new strategy on their daily tasks, as was the purpose of introducing interview technique from narrative therapy in the strategy implementation workshops. In the past decade, narrative methods have been suggested and used (e.g. Abdallah & Langley, 2014; Balogun, Jacobs, Jarzabkowski, Mantere, & Vaara, 2014; Boje, 2014; Brown & Thompson, 2013; Fenton & Langley, 2011; Heracleous & Jacobs, 2008; Küpers et al., 2012; Logemann, 2013; Mantere, 2013; Ravasi & Phillips, 2011; Rouleau & Balogun, 2011; Seidl & Whittington, 2014; Sonenshein, 2010; Vaara & Reff Pedersen, 2013) to make sense of strategy in an organizational context. This Industrial PhD study supports previously research by presenting a methodological approach to sensemaking in a strategy implementation context through narrative inquiry. Further, it adds to the existing research by zooming in on the strategy pre-implementation phase and shows how knowledge about the new strategy can be mobilized and future action planning can be aligned with the strategy in a ba when facilitated by narrative interview technique. The ba enables depth and intensity which in turn enable interpretation and sensemaking of the initially abstract strategy, making it experience-near and relatable to everyday tasks.

It is particularly valuable to take advantage of the possibilities of a ba at a liminal stage in the strategy process, such as the pre-implementation phase, to best use the little available time in a resource-scarce organization. Zooming out to the overall

strategy approach, the very focused efforts to develop an effective workshop design and facilitation technique presented in this dissertation blur the punctuation of the strategy process, between development and implementation, that is characteristic to the deliberate strategy approach and which was criticized (Ansoff, 1991; Mintzberg, 1990, 1991). Although thought can still be said to precede action, the strategy as an abstract notion is quickly anchored in employees' experience-near interpretation of everyday events and problems. This study shows that employees can quickly mobilize knowledge to understand and use the strategy to select and deselect future action, thus ensuring alignment of future action and strategy. Therefore, although the detachment between thought and action in the deliberate strategy approach still stands, its implications are here shown to be minimal for the frontline employee.

The second aspect I want to focus on in this section is the possibilities for clarity of the strategic objectives that the deliberate and emergent strategy approaches enable, respectively. In the following quote, Liedtka uses her empirical experience to demonstrate how the clarity of objectives in a deliberate strategy approach increases as the strategy development progresses and how clarity of objectives, as opposed to fuzzy objectives, is important to managers:

In twenty years of work with managers of companies attempting to implement new strategies, I have yet to hear a manager lament, "if only the strategy was less clear, I would have more freedom to act." The refrain is universally the opposite—"if only they would lay out where they think we're headed, I would be happy to do my part!" The goal of achieving clarity in the ultimate design does not imply that such clarity is present throughout the design process. Clearly, things start "fuzzy" and get clearer. They get clearer through a process of iteration, as needed for implementation. (Liedtka, 2000, p. 27)

It appears that a deliberate strategy approach enables clarity of objectives to a higher degree than an emergent strategy approach. The objectives can be equally precise and stretchy, i.e. based on an underlying strategic intent to ‘stretch’, “to reach explicitly for potentially unattainable goals” (Liedtka, 2000, p. 23). The rationale for using stretch goals is that although they may seem to be unattainable at first, they can in fact be broken down into manageable phases where the employees need to stretch, i.e. work hard, to achieve the milestones that are necessary to reach the stretch goal. The clarity of objectives, then, does not come from the formulation of objectives, but rather from their time horizon which is correlated with the planning horizon for the strategy and thus the stability of the environment. If an organization’s environment is stable enough to allow a long-term planning horizon, the hallmark of a deliberate strategy approach, the clarity of objectives can be enhanced compared to an emergent strategy approach in a less stable environment which calls for a shorter planning horizon. The environmental insecurity obscures the clarity of objectives or, at least, the planning horizon: the shorter the planning horizon is, the less clear the strategy direction of the company is (Radomska, 2014, p. 265). Therefore, the possibility for creating strategic objectives that set a clear direction for the future, and thereby are perceived as clear by the employees, is greater in a deliberate strategy approach.

This study shows that long-term strategic objectives developed by top management can be interpreted in an experience-near fashion by employees in a way that is facilitated by narrative interview technique. The interpretation can take place in a relatively short period of time, in the cases included in this study in less than three hours, and in some of the workshops I conducted after the data collection was finished, as little as one and a half hours. By introducing an element from the emergent strategy approach, centered on frontline employees’ interpretation of the

top-down developed strategy, in a deliberate strategy approach, the criticized negative effects of a top steered process can be minimized. This makes iterative prototyping of strategy implementation workshop design combined with narrative facilitation a promising endeavor for organizations in relatively stable environments which enable a long-term planning horizon.

5.3.2 The strategy-as-practice field can be strengthened through insider action research

The strategy-as-practice field has immediate appeal for strategy practitioners such as strategy consultants because the notion ‘practice’ indicates that we can use the research for something in our organizations. The immediate curiosity is supported by the field’s research agenda which is referred to ubiquitously in research papers: that it is “concerned with the doing of strategy; who does it, what they do, how they do it, what they use and what implications this has for shaping strategy” through attention to “practitioner (those people who do the work of strategy); practices (the social, symbolic and material tools through which strategy work is done); and praxis (the flow of activity in which strategy is accomplished)” (Jarzabkowski & Spee, 2009, p. 70) for the purpose of advancing “better everyday strategizing praxis, empowered by more effective practices and a deeper pool of skilled practitioners” (Whittington, 2006, p. 629). The founding thought is that observance of reflective practitioners’ strategy activities in practice can yield more insight into what strategists do and with what effect which can provide opportunity for yet more reflective strategizing which again offers more insight and so on.

Strategy practice	Strategy praxis	Methodology	Data collection method	Study
Strategy workshop dynamics and outcomes	Components of rituals, e.g. removal from everyday surroundings, presence of liturgy and specialists	Qualitative – case study	Retrospective group interviews, observations	(Bourque & Johnson, 2009; Johnson et al., 2010)
Team meetings	Discursive realization of leadership	Qualitative – case study	Audio recordings and observations	(Clarke et al., 2012; Kwon et al., 2014; Wodak et al., 2011)
Strategy meetings: initiation, conduct, termination	Micro processes that stabilize or destabilize strategic orientation	Qualitative – case study	Observations, field notes	(Jarzabkowski & Seidl, 2008)
Top team meetings	Team relationship dynamics: drawing together, driving apart	Qualitative – case study	Observations including audio and video recording	(Liu & Maitlis, 2014)
Managers' visual interaction with strategy tools during workshops	Visual interactions: shift, inertia, and assembly	Qualitative – case study	Video and audio recordings, field notes	(Paroutis et al., 2015)
Strategy making at strategy workshops	Stimulating strategic discussion through knowledge sharing, promoting strategic consensus, constraining strategy making	Qualitative – case study	Observations, shadowing, informal discussions, audio recordings, interviews, review of documents and archives	(Schwarz, 2009)

Relationships between design characteristics and outcomes of strategy workshops	Clarity of goals and purpose, routinization, stakeholder involvement and cognitive effort	Quantitative – survey	Survey	(Healey et al., 2015)
Strategy workshops	Factors that may or may not lead to successful workshops, e.g. on-/off-site, planned/urgent, single/series, presence of top management, duration, number of participants, presence of facilitator, use of analytical tools	Quantitative – survey	Survey	(van Aaken et al., 2013)

Table 5.3. Studies of strategy workshops/meetings in the past decade (my categorization, the studies of this Industrial PhD project are excluded)

Table 5.3 displays an overview of practice studies of strategy workshops and strategy meetings spanning the past decade (2008-2017), how the data was collected, and what strategy praxis the analysis found. The qualitative studies are all case studies and use chiefly interviews, observations, and documentation as data collection methods. The quantitative studies all use survey methods. All studies in the overview share one commonality: their data is collected at the workshop event or retrospectively after the event where informants are asked to think back and report what happened at the workshop. Although some of the studies could have included data on how the workshop was planned, e.g. whom to invite, how many to invite, workshop process in the form of a flowchart, planning goals and purpose (Schwarz, 2009 does point to clarity of goals and purpose as an important element in successful

workshops, but based on observations at the workshops; she does not investigate how to define clear goals and purpose prior to the workshop), their analysis starts with the workshop situation. The workshop studies provide a number of implications that practitioners can use to plan successful workshops.

Based on this Industrial PhD study and the empirical papers it includes, I propose that insider action research as researcher position and means for data collection offers a unique possibility to supplement the already strong predominantly ethnographic researcher position: through organizational membership and organizational embeddedness (Herepath, 2014, p. 875) and as an active participant in the planning and execution of strategy workshops, the insider action researcher can contribute to the strategy-as-practice field with studies of planning of strategy workshops, development of strategy workshop design, and detailed execution of strategy workshops.

The insider action researcher has the advantage that s/he can be part of the emergence of the idea of the workshop where the ethnographer or survey researcher can only start the study when the workshop has already been planned – how else could s/he know that the workshop is going to take place? Focus on the pre-workshop strategizing activities of a strategy consultant can lead to research that has a strong applied element, yet contributes to a research field as well. The insider action researcher is uniquely positioned to add the currently underexplored practice of strategy workshop planning and – to some extent at least – workshop facilitation to strategy-as-practice research.

In a recent discussion revolving around the term ‘practice’, it was argued that examination of publicly known, generalizable strategy activities can help organizations select practices that may be particularly applicable in their local context

and thus enhance performance (Bromiley & Rau, 2014, 2016). The approach was labeled ‘the practice-based view of strategy’. Strategy-as-practice scholars criticized the practice-based view of marginalizing the people who are engaged in the activity and how they carry out the activity by only focusing on the practice and its possibility for being generalized (Jarzabkowski, Kaplan, Seidl, & Whittington, 2016a; Jarzabkowski et al., 2016b). The discussion showed that strategy-as-practice scholars are committed to contextually representing practice, praxis, and practitioners at the cost of generalizability. Scholars advocating the practice based view are committed to identifying and analyzing strategy practices that can be generalized so that others can learn from them at the cost of empirical detail. At the heart of the discussion is whether practices can be transferred between firms and whether strategy practices are (just) explicit “procedures prescribed in consulting manuals” (Jarzabkowski et al., 2016a, p. 272). This foregrounds the ontological entanglement of practice, praxis and practitioner in strategy-as-practice.

Strategy practice and praxis observed and executed by an insider action researcher can help dissolve this seemingly irreconcilable dilemma between the strategy-as-practice and the practice based view approaches. Through the action research ontology where knowledge is brought into existence *through action* and the corresponding epistemology where the knowledge is accessed *through action* (Huang, 2010), the entanglement of practice, praxis, and practitioner is relaxed through a recognition that the practitioner has the power of enactment over the praxis and practice. Strategy practice does not simply emerge to be observed in a particular empirical context, as a very literal reading of the strategy-as-practice literature can lead one to think; it can be a carefully planned activity, as this Industrial PhD study shows, where careful deliberations and process development precede the enactment

of a practice – which is the object of study in the majority of previous studies (see Table 5.3). Such a carefully planned activity that precedes the actual practice is not dissimilar from prescribing procedures in consulting manuals, as Jarzabkowski et al. (2016a, p. 272) criticize. At the same time, insider action research can go further into empirical detail than the practice based view as it was argued in Bromiley & Rau’s articles (2014, 2016): while opening the door to possible generalizability studies of strategy practices, insider action research can maintain the great level of empirical detail that characterize strategy-as-practice studies. By bridging the strategy-as-practice and practice based view approaches, insider action research has the possibility to disseminate generalizable practices while providing an in-depth description of how practitioners have previously used the practices which, in combination, is a valuable contribution to strategy research.

More specifically, I propose that insider action research can benefit future strategy research within the areas of linkage of the macro and micro in strategy, agency in strategy and strategizing, practitioners and their knowledge (Golsorkhi et al., 2015), and can support an increased attention to methodologically oriented research (Jarzabkowski et al., 2007). Further, Seidl and Whittington (2014) are surprised that little research has been dedicated to instances of strategizing praxis and how they can be interconnected – what they call flat ontologies (pp. 1415–1416). As an example, I view the empirical account, included in this dissertation, of the iterative prototyping development of a strategy workshop design as an example of a web of interconnected praxes that takes into account design praxis as well as facilitation praxis and connects the two in a joint narrative-based style of theorizing practitioner knowledge processes (Cornelissen, 2017) in a strategy context.

Additionally, insider action research of strategy practice can be useful to practitioners in different ways: it can have instrumental relevance as well as conceptual relevance (Seidl, 2012, who also talks about a third form of relevance, legitimacy relevance, which is not so applicable to strategy-as-practice research). Instrumental relevance is when research helps a practitioner decide what to do by reducing the complexity of a situation (Jarzabkowski & Kaplan, 2015, p. 554; Seidl, 2012); again I call attention to the papers of this dissertation, which can have instrumental relevance to practitioners through the interview guides and the workshop design. Conceptual relevance is when research can help change the perception of practitioners about their situation thereby widening the practitioner's view of a particular situation. Seidl (2012) points out that the strategy-as-practice researcher requires a detached position to distance him-/herself from the situation that is being studied, but that the distance obscures the "meaningful totality and practical necessities of the practitioner, e.g. the time pressure in the situation". As a consequence, he points out, little rigorous research in strategy-as-practice provides instrumental guidance. The distance does facilitate studying structures that shape the context of practitioners, and strategy-as-practice researchers can uncover constraining and enabling forces in the situation, and can thereby provide practitioners alternative ways to see their situation which can create new possibilities for action, i.e. conceptual relevance.

The challenge to a strategy-as-practice researcher is therefore to balance research that is instrumentally relevant to practitioners and can simplify a situation and research that is conceptually relevant to practitioners and can make a situation even more complex (Seidl, 2012). The challenge with making conceptual knowledge relevant to practitioners is that it requires some level of understanding of the theoretical context in which the knowledge was developed, and is the practitioner willing to engage in

learning about the theoretical context (Seidl, 2012)? I maintain that an insider action researcher can produce rigorous research that is both instrumentally *and* conceptually relevant, and the position of the insider action research thus provides unique opportunities for the strategy-as-practice field. The instrumental relevance can materialize in how-to guides that simplify decisions. Due to the insider action researcher's dual role (Roth et al., 2011), as member of the organization and as researcher, s/he is ideally positioned to generate at least a rudimentary understanding of the relevant theoretical concepts inside the organization s/he is a part of. This dissemination to practitioners is imperative in action research (Dick & Greenwood, 2015).

5.3.3 Limitations and directions for future research

The limitations of the empirical papers were addressed in the papers themselves and will not be reiterated here, rather, I want to focus on two overall limitations to this Industrial PhD study seen as a whole across the papers: first, the case study design which was a single company multiple case study; and second, my personal presence at the workshops. I will argue that each limitation was necessary in this Industrial PhD project and that each limitation provides a possibility for future research that can possibly strengthen the findings presented here.

The first limitation concerns the case study design. An in-depth investigation of a strategy process at the micro level, characterized by a research question beginning with a 'why' or a 'how', naturally lends itself to a case study which allows the researcher to propose analytical generalizations based on observed practice at the expense of statistical generalization (Flyvbjerg, 2006; Yin, 2013). The findings of a single-case design can be bolstered by adding more cases, making the research design label 'multiple-case study'. The findings of multiple-case studies are "often

considered more compelling, and the overall study is therefore regarded as more robust” (Yin, 2013, p. 57). A multiple-case study often follows a replication design that predicts similar results, in this case similar or complementing micro activities at the strategy implementation workshops, or contrasting results that differ expectedly according to relevant theory. Multiple-case studies require extensive resources to conduct in the form of time consumption of, often, a single researcher. A case study is frequently conducted at a single organization, the present study included, which is not a limitation in light of a ‘why’ or ‘how’ research question, which has inherent contextual specificity, but can be challenged when addressing a strategy practice such as strategy workshops (recall the discussion concerning transferability of a strategy practice in Bromiley & Rau, 2014, 2016, Jarzabkowski et al., 2016a, 2016b): can it be analytically generalized?

To accommodate this possible limitation of the current single-company multiple-case study, two follow-up case studies in different contexts have been made to further explore the findings presented in this dissertation; they will be sought published after the Industrial PhD project.

First, I facilitated a public meeting on 10 November 2016 for inhabitants of the Danish island Samsø, an island of 114 square kilometers. The purpose of the meeting was to develop a sort of mission statement that captured the force that connects the people to the island and a catalogue of ideas that, using the mission statement as point of departure, could be brought into play to attract families to the island to counter a trend of depopulation. At the end of the public meeting, the idea catalogue was handed over to a representative of the municipality for inspiration and political action – at least that was the wish of the organizing committee. 67 people showed up, and their stories were elicited using interview technique from narrative therapy and were

used to co-develop a mission statement for Samsø's Northern isle. We then continued to define activities that they would like to undertake, that were aligned with the mission. The result was a list of 24 ideas that were described in the idea catalogue and handed over to the participating city councilor. The context was public, non-profit. An initial analysis showed a congruence of micro activities between the public meeting and the strategy implementation workshops at the diesel engine company.

Second, in yet a third context, I facilitated a workshop for the Programme Administration Services at Copenhagen Business School to support their formulation of the unit's identity. 21 employees attended the workshop and, contrary to the Samsø public meeting where all 67 attendees participated and witnessed (White, 2005) each other's stories all at once, there were four working groups, working in parallel based on White's interview map 2 (White, 2007) in a brainstorm to describe their desired future. Again, the micro activities at this workshop were congruent with the micro activities at the strategy implementation workshops at the diesel engine company.

I have thus tried to test the narrative facilitation technique in various contexts to establish its versatility. When the studies are finished, they may support the findings beyond the single-company focus of this Industrial PhD project. However, to further strengthen this single-company multiple-case study, I propose that decidedly quantitative experiments investigate the effectiveness of both the workshop design and the facilitation technique in more controlled experiments. That this may be fruitful was suggested by the second empirical paper which posited a significantly positive effect of using the facilitation technique as opposed to not using it to facilitate strategy implementation workshops. The future research could possibly develop and test a structural equation model with 'alignment with strategy' as the

indirect variable (DeVellis, 2017), which was the desired effect of the strategy implementation workshops.

The second limitation concerns my personal presence at the workshops: as one of the external strategy consultants stated in the secondary data collection when I presented my findings to him and his colleagues:

the study was developed based on 10 years' experience in the specific company. [...] In my world it requires insight and understanding of how the psychotherapeutic approach can be used, i.e. it requires not only training, but also a general interest for the therapeutic area and the value it can contribute with. [people like that] aren't easy to find [Danish: hænger ikke på træerne]. I judge that many facilitators in companies are focused on the method and outcome of workshops, and not so much on understanding the real problem that needs to be solved. This competence gap appears to be the biggest challenge to me.

In short, could the findings have been made without my 10 years prior knowledge of the company, and can the findings be substantiated without the presence of a trained narrative facilitator? These limitations address the analytical generalizability of a study carried out by an insider action researcher. They are inescapable and can only be dealt with by transparently and honestly describing the empirical context and events as I experienced them which is what I have tried to do to my best ability in this dissertation and in the empirical papers. Future research could be case studies of strategy implementation workshops at the same company or other companies or other contexts done by a facilitator without prior knowledge of the company to eliminate the limitation of my person in the research. Future research could also be case studies of how facilitators that are not trained in interview technique from narrative therapy

take on facilitating a strategy implementation workshop with the interview guide that was proposed in the empirical paper on ‘the effectiveness of strategy tools’.

Finally, this study was conducted in a Danish organization: testing the workshop design and facilitation technique in another cultural context where employees cannot be expected to speak openly about problems in the presence of their manager is needed to validate the analytical generalizations made here. A former publication (Kryger, 2013), however, includes a case study of a project workshop at the diesel engine company with participants from Germany and Switzerland, and not published case studies of workshops with Eastern European participants have also been done. The workshops with non-Danish participants showed similar results with respect to micro activities as the strategy implementation workshops part of this study. What remains and what is particularly interesting is to test the method with Asian participants who can be expected to be less willing to disclose problems (e.g. Delhey & Welzel, 2012), although German and some Eastern European communities share some of the cultural traits concerning for example power distance and trust with some Asian communities.

5.4 Summary

In summary of the discussion, I have argued that the strategy implementation workshops at the diesel engine company had the three features that jointly enable knowledge creation: a ba, the SECI sequence, and a facilitator. The four ba enabling conditions - mutual trust of participants, exchange of diverse knowledge, application of elicited knowledge, and clear set of objectives - were identified at the workshops. Further, the workshops can be viewed as strategic episodes with an alternative temporality compared to the organization’s normal deadline-oriented temporality. Whereas the whole SECI sequence did not take place at the workshops, I have argued

that socialization can be expected to have taken place prior to the workshop and shown that externalization and combination processes could be identified at the workshops; internalization can be expected to take place after the workshops. Finally, the positive effect of the facilitator – and by inference of the narrative facilitation technique – were indicated by participants at the workshops. The four empirical papers viewed as a whole allowed me to detail a theoretical model (Figure 5.1) of knowledge creation at a strategy implementation workshop. Where the knowledge mobilization in a strategic context at the diesel engine company established previously missing relations from strategy to structure and processes, which enabled organizational change that is aligned with the strategy, relations from strategy to reward systems and HR policies were not established in this study. I propose, however, that other organizations with direct control over reward systems and HR policies can use the workshop method to also (re-)establish missing links from strategy to reward systems and HR policies to ensure strategic alignment of organizational change.

Through insider action research, I have identified the strategy pre-implementation phase, which is the short period of time after the strategy development is finished and the strategy text is fixed and before the strategy implementation starts, as an interesting object of research. This short phase can be used to prepare not only the physical strategy material, but also strategy tools that can facilitate the strategy implementation, e.g. a strategy implementation workshop method. Taking advantage of the time gap between strategy development and implementation to mobilize frontline employees' knowledge and anchor organizational change in the new strategy is an example of how an emergent strategy tool can work in a deliberate strategy approach. Such an effort diminishes the schism between the deliberate and

emergent strategy approaches, and demonstrates how the long-term clarity and direction as hallmarks of deliberate strategy can be supported, not restricted, by introducing a bottom-up workshop method to mobilize frontline employees' knowledge. Insider action research of strategy practice has the possibility to support and expand the strategy-as-practice research agenda through instrumental and conceptual relevance to practitioners which is enabled by the insider action researcher's organizational membership. The limitations of this single-company multiple-case study can be addressed in future research, e.g. to establish whether the findings can be analytically generalized in a public or non-profit context, without a trained narrative coach as facilitator of the workshops, and in other cultural contexts.

6. Conclusion

The dissertation shows how employees' planned actions and company strategy can be aligned in a resource-scarce organization in a strategy implementation workshop where a new strategy is first introduced at an abstract level and then made experience-near through facilitation with interview technique from narrative therapy. This enables participants to interpret past and possible future tasks in connection with the new strategy and formulate, select and plan future action that is aligned with the strategy, thus supporting the strategy implementation. It is useful and valuable to a resource-scarce organization to make a focused effort at exactly the point in time when the strategy formulation is finished and before the implementation starts to prepare and optimize the workshop method so that it can support the impending strategy implementation. The participants' knowledge mobilization can establish, or possibly re-establish, previously missing relations between the dimension of strategy and the dimensions of structure and processes, thereby anchoring organizational change in the strategy so that future actions are aligned with the strategy. These knowledge activities that target the frontline employees can support the conventional trickle-down cascade of strategy in an organization. Stated in a strategy implementation perspective, a bottom-up element from the emergent strategy approach can be introduced in the short strategy pre-implementation period in the deliberate, top-down strategy approach.

The strategy implementation workshop can be conceptualized as a strategic episode (Hendry & Seidl, 2003) which detaches the workshop from the organization's deadline temporality and delivery orientation and opens a space for deep reflection. The space, referred to as a *ba* in knowledge management literature (Nonaka et al., 2000), originates when the strategy is introduced in detail yet at an abstract level at

the beginning of the workshop. A dialoguing ba occurs when problems and possible future actions are co-constructed by the participants in a process of externalization of previously socialized knowledge. A systemizing ba occurs when participants prioritize and select among the externalized actions and subsequently engage in action planning and finally link the action to strategy. At this closing stage of the workshop, knowledge can be said to be combined or systematized and this process allows the strategy to be interpreted at an experience-near level. The knowledge that was mobilized can be internalized by the participants in a process of enactment in an exercising ba when the strategic episode ends and they rejoin the organization's temporality. A strategy implementation workshop with this design and narrative facilitation can therefore provide the three required elements for knowledge creation: a ba, a facilitator, and a process for the SECI sequence where knowledge is first socialized/internalized, externalized through dialogue, combined by systematizing the knowledge, and finally internalized through exercising enactment.

Making an abstract strategy experience-near requires knowledge creation, mobilization and application. By storying their problems within a ba, the highly specialized engineers in this study co-authored joint definitions of their problems and were able to describe possible solutions, prioritize them and ultimately make a selection of actions that were likely to have a high impact on the strategy, which they had signed up to implement. By using narrative interview technique in an organizational strategy context, I introduced a guiding element in the otherwise free experiential process that characterizes narrative therapy: the narrative elicitation process is steered by the facilitator so that issues that are relevant in a strategy implementation context can be extracted. A narrative inquiry in a therapeutic context goes deep, takes time, and seeks to develop thick stories about problems and

solutions. A narrative inquiry at a strategy workshop – at least in the form they took at the diesel engine company – cannot go as deep and less time can be spent. Therefore, a narrative inquiry in a strategy context needs more steering by the facilitator to achieve its purpose.

Four empirical papers have been brought to various stages of publication as part of this Industrial PhD project. Where the papers and the dissertation seen as a whole allow conceptual development of a theoretical model of knowledge creation at a strategy implementation workshop, the papers are intended as examples of industrial research with some level of instrumental relevance to practitioners. The papers yielded four main findings:

First, the hallmark of narrative therapy to deconstruct problems and find solutions (Hutto & Gallagher, 2017; Polkinghorne, 2004; Vromans & Schweitzer, 2011; White & Epston, 1990), that the client exercises agency to undertake to minimize or eliminate the effects of the problem, can be transferred from a therapeutic context to an organizational context. Narrative therapy's interview maps (White, 2007) can be accommodated to an organizational context by speeding up the inquiry provided that the principle of dwelling is adhered to at particularly the first two interview stages where a specific and experience-near definition of the problem is made and where its effects are identified. A short interview can still lead to the making of an action plan which the employees can see themselves doing and express intention to do, as is the desired end state in a therapeutic setting – as well as in strategy. The feature of narrative interview technique to efficiently and effectively find solutions to problems qualifies it as facilitation technique in resource-scarce organizations.

Second, a rigorous yet versatile strategy implementation workshop design that supports a workshop facilitator in consistently achieving the workshop objectives in a

strategy development context can be developed through iterative prototyping (Dow et al., 2011). Iterative prototyping of workshop design requires a clear definition of the workshop objectives, collaboratively developing a prototype design (process flow) for a workshop through client and peer dialogue, testing the prototype design in practice, and finally evaluating it through client and peer evaluation. In resource-constrained environments, iterative prototyping of workshop design can ensure that each workshop iteration is value adding while the optimal workshop design is being developed. Iterative prototyping of workshop design, however, requires mandate by top managers as well as the managers of the departments whose workshops are executed as prototypes and therefore will not always be possible, particularly in the case of external strategy consulting where the consultant may be expected to present the best solution to begin with. Therefore, iterative prototyping of workshop design as a strategy tool is more suitable for an in-house strategy consultant than an external consultant.

Third, the effectiveness of a facilitation technique can be assessed using the Mann-Whitney U-test (Hart, 2001) if the workshop documentation can be numerically evaluated and if the data can be compared to documentation from a control group, i.e. workshops of similar design, but without the facilitation technique. The Mann-Whitney test is used to compare the effectiveness of two interventions, and the test is an expression of the likelihood of a randomly selected value from one intervention having a higher value compared to the other intervention. The purpose of assessing the effectiveness of an organizational intervention such as a workshop is to drive strategizing practice forward by developing better tools, such as a facilitation technique, and more qualified practitioners, who are interested in applying the tools and knowledgeable about how to test their effectiveness. When it has been

determined if a facilitation technique is effective, it can be condensed to an essential core of facilitating questions through sorting and naming exercises with employees. This condensation process culminating in a prescriptive interview guide can provide consultants and facilitators without a narrative education with a starter package for narrative interviewing.

Fourth, from an analytical angle, strategy consultants can gain insight in strategy and workshop praxes through coding of micro activity at strategy implementation workshops. I define coding of micro activity as a third order analysis of qualitative data that follows first and second order thematic coding after conceptual saturation is reached, which focuses on identifying causal and temporal patterns of the second order codes to enable instrumental insight based on an organizational event. Coding of micro activity allows strategy consultants to visualize how actions taken during the workshop lead to the development of associated actions, i.e. how the workshop process can be steered in relation to the workshop objectives. The application potential of this analytical approach, however, is expected to be limited and in practice probably confined to in-house consultants trained as insider action researchers or someone with special interests in understanding the micro activities at an organizational event in detail: a strategy consultant without a research background or without a special interest will never have time or interest in transcribing, which can of course also be purchased, and coding transcripts from workshops. Attention to coding of micro activities as an analytical tool, however, can further insight in strategy praxis.

Although insider action research (Roth et al., 2011) is not a new researcher position in general, it does offer new possibilities to strategy research, particularly practice-oriented strategy research. The novelty and value come from the dual membership of

the insider action researcher as simultaneously organizational member and researcher. This enables the insider action researcher to not only observe, but also effect organizational change and be part of the process. The organizational embeddedness combined with the possibility to withdraw, reflect and discuss with academic peers enable the insider action researcher to see what other researcher positions cannot: events and possibilities for new knowledge that arise in practice. Research literature on strategy implementation maintains a schism between a deliberate strategy approach and an emergent strategy approach in an attempt to categorize empirical data (Ansoff, 1991; Mintzberg, 1990). Although I have used that very framing to present the findings of this study, I have indicated that the schism is inconsistent and that implementation does not immediately follow development. This finding allowed me to point to the possibilities for drawing on emergent strategy elements in the post-development, pre-implementation period which I have referred to as the pre-implementation phase. From a theoretical perspective, this time period may seem inexistent or unimportant and short and therefore uninteresting to study – the absence of previous studies support this claim – but an insider action researcher has the possibility to identify such a phenomenon and do something with it. The identification of the period and the possibilities to lay the groundwork for the impending strategy implementation were enabled through my organizational membership.

Multiple researcher positions can result in new knowledge in the strategy field. Insider action researchers can identify new strategy phenomena which can be studied in more detail by ethnographers in case studies or quantitative researchers in structured experiments to develop knowledge and theory. I argue, however, that the greatest value for the strategy research field can be generated when several researcher

positions are combined in the same study. Each researcher position has strengths and weaknesses, but in combination insider action research, ethnography and quantitative methods not only supplement but amplify each other in creating synergistic research that can be instrumentally as well as conceptually relevant to practitioners and scholars alike. This Industrial PhD study was limited to one organization in Denmark, and future research could advantageously span multiple companies with different business models, e.g. non-profit and public organizations, and different cultures to enable bolder claims of generalizability. The multiple-company case study could be supplemented by structured experiments in controlled settings to quantitatively test the effectiveness of the workshop design and the narrative interview guide in aligning future action with a strategy. More specifically, I foresee that combining multiple researcher positions can drive theory development in the area of linking macro activities with micro activities in strategy which is intricately linked to practitioners and their knowledge (Golsorkhi et al., 2015, p. 18).

Looking back and forward

This Industrial PhD project was conceived after a strategy workshop in 2012 and has been many years underway, most of them inside my head. After having finished my own journey that culminated with this dissertation and the papers included in it, I can strongly recommend pursuing an Industrial PhD degree to other curious practitioners in search of enlightenment. It will surely be a journey with ups and downs and many side steps before progress can be made – it was for me. It was definitely worth it. At the end of the journey, I am grateful to have had the privilege to be a part of a group of dedicated scholars for a while. I hope that the inclusion does not end with the project. I shall endeavor to use what I have learned to develop and execute rigorous and versatile strategy processes while continuing to disseminate my findings in

academic outlets. I aspire to take part in developing “better everyday strategizing praxis, empowered by more effective practices and a deeper pool of skilled practitioners” (Whittington, 2006, p. 629).

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