

How non-executive strategy professionals in multi-business firms strategize

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Abstract

Purpose – This paper expands theory on strategists by investigating how non-executive strategy professionals in multi-business firms strategize. In focus is the strategizing of two groups of non-executive strategy professionals: a corporate strategy team and eleven business strategists employed in each of the incorporated units.

Design/methodology/approach – A case study design was employed to explore privileged accessed data to gain first-hand in-depth qualities of strategists' work. The design was characterized by phenomenon driven immersed participatory insider research with retrospective reflection and theorizing. Data includes strategies, interview data, calendars, meeting minutes, workshop material and observational field notes.

Findings – Non-executive strategy professionals in multi-business firms are either employed at the corporate center or in the peripheral businesses. Based on this location and their individual experiences they assume an exclusive content or an inclusive process strategizing orientation. In practice, the groups strategize tightly together.

Research limitations/implications – Case studies are useful in explorative research providing thick descriptions. While empirically rich, the results of this study are limited by the context of one single case. Future research is encouraged to confirm, contradict and refine the results presented.

Practical implications – The insights from this study can help organizations regarding how to employ strategy professionals in multi-business firms.

Originality/value – This paper contributes to a recognized need to explore strategists' work. In contrary to the majority of existing research, focusing on senior management and/or strategy formulation, this paper highlighted non-executive strategy professionals' strategizing.

Keywords Strategist, Strategy professional, Strategizing, Case study

Paper type Research paper

1. Introduction

Organizations increasingly rely on the expertise of non-executive strategy professionals (e.g. Müller-Stewens, 2020; Whittington *et al.*, 2017). However, the role they play in strategizing is not yet fully explored. This paper addresses a challenge raised by an existing change in our understanding of organizations' strategizing. Traditionally, the strategy literature has viewed strategizing as something a "managerial elite" engages in (e.g. Ansoff, 1964; Hambrick and Mason, 1984; Pettigrew, 1992). Increasingly, however, strategizing is seen as more collaborative and open to various stakeholders (e.g. Balogun and Rouleau, 2017; Hendry *et al.*, 2010; Mack and Szulanski, 2017; Vaara *et al.*, 2018; Whittington, 2019). Many organizations consist of several entities, and strategizing in such organizations includes

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multiple periods of time, actors and contexts (Hendry and Seidl, 2003). Strategizing in such organizations is typically a social process that needs to be managed in a way that harnesses the firm's common forces (Jarzabkowski and Balogun, 2009).

Correspondingly, studies show how large organizations (e.g. multi-business firms) increasingly employ Chief Strategy Officers, Strategic planners and similar to manage organizations' strategizing (Breene *et al.*, 2007; Menz and Scheef, 2014; Whittington *et al.*, 2017). Such employments enable coordinated strategizing across the organization and increases alignment (Jarzabkowski and Balogun, 2009; Watson and Wooldridge, 2005). However, they also risk separating strategy from the business (Kiechel, 2010; Montgomery, 2012; Wadström, 2018). As businesses' environments become less stable (D'Aveni *et al.*, 2010), centralized functions, e.g. strategy departments, are too remote from change on the ground to ensure organizations stay in fit with their environments (Grant, 2003).

In parallel to an increased employment of strategists, the strategist has gone through a professionalization (Whittington *et al.*, 2011); as more professional strategists are employed, what they do, and should do, in strategizing is often unclear (Angwin *et al.*, 2009; Hendry *et al.*, 2010; Van den Steen, 2018; Whittington, 2019). Consequently, as strategizing changes, our understanding of how different strategists are employed needs to be extended (Jarzabkowski and Spee, 2009; Vaara and Whittington, 2012). The purpose of this study is therefore to develop strategizing knowledge that increases our understanding of strategists' work in multi-business firms by investigating *how non-executive strategy professionals in multi-business firms strategize?*

Non-executive strategy professionals is reserved for individuals for whom strategizing is a main part of the job (Wolf and Floyd, 2013) and who are freed executive responsibilities (Mintzberg, 1994); strategizing regards the arranging and facilitating activities contributing to the direction of the organization (Jarzabkowski *et al.*, 2007); and multi-business firms refer to organizations with different distinct specialized units operating on different markets and a central entity that to some extent manages these units (Chandler, 1991).

This study used an immersed case study approach, exploring unique thick data, illustrating an engineering and construction group's strategizing. The paper makes three contributions: first, it adds to the debate on strategists (e.g. Van den Steen, 2018; Whittington, 2019) by developing concepts for different types of strategists; second, it informs research on strategy professionals (e.g. Mentz and Scheef, 2014; Whittington *et al.*, 2017) by illustrating two types of non-executive strategy professionals and how they strategize; and finally, it contributes to the strategizing literature (e.g. Jarzabkowski *et al.*, 2007; Vaara and Whittington, 2012) by conceptualizing multi-business firm strategizing from a non-executive strategy professional's standpoint. The resulting insights may improve managers' understanding regarding the employment of non-executive strategy professionals in multi-business firms.

2. Literature

In line with previous research (e.g. Jarzabkowski and Spee, 2009; Johnson *et al.*, 2003; Whittington, 2003), this paper employs two interrelated lines of inquiry to explore the literature in relation to non-executive strategy professionals' strategizing: *who* they are and *how* they strategize.

2.1 Strategists

Several attempts have been made to define *who* a strategist is (e.g. Montgomery, 2012; Müller-Stewens, 2020; Watson, 2003). However, concepts enabling researchers to zoom in (Nicolini, 2009) on one particular type of strategist is scarce. This study makes a first attempt to develop such a framework.

Based on the literature, strategists can be divided into six different types: *executive strategy professionals*; *non-executive strategy professionals*; *executive strategy participants*; *non-executive strategy participants*; *executive strategic individuals*; and *non-executive strategic individuals* (Figure 1).

A first division of strategists regards responsibility: the division of *executives* and *non-executives*. Early studies define the strategist preeminently from an organizational perspective, as individuals in senior management positions (Hambrick and Mason, 1984; Pettigrew, 1992). This is yet a common sampling in the study of strategists (e.g. Menz and Scheef, 2014; Van den Steen, 2018). Such a focus is legitimate. One part of senior management's formal role is to develop strategic direction (Higgs and Dulewicz, 1998) and they aspire to spend more time on strategizing (Hendry et al., 2010). However, much strategy research also suggests the concept strategist needs to include a wider range of individuals across the organization, e.g. first-line managers and operational personnel (e.g. Balogun and Rouleau, 2017; Hautz et al., 2017; Whittington, 2007), as they contribute to the direction of the organization (Jarzabkowski et al., 2007). Although focusing entirely on senior management promotes a risk of missing important aspects of strategizing (Knights and Morgan, 1991), treating all individual action as strategically relevant, imposes a risk of eroding the importance of strategy (Johnson et al., 2003; Westley, 1990; Whittington, 2003). Whereas Mintzberg (1994) suggests strategists may typically be freed line responsibilities, executives have the authorization to make decisions about how operations are run and are responsible for the consequences of those decisions (Barnard, 1969/1938). Consequently, strategists who are executives are not freed executive responsibility. Therefore, we can conclude that strategists are either executives or non-executives.

A second division is related to the arranging or facilitating activities that contribute to the direction of the organization (Jarzabkowski et al., 2007). *Strategy professionals* are individuals for whom strategizing is a main part of the job (Wolf and Floyd, 2013). Thus, characteristically they arrange and facilitate strategizing. Other members of the organization contribute to the direction of the organization by participating in such activities (Hautz et al., 2017). These participants' contribution, however, is typically limited to participating; their main task is not strategizing. Participating in strategizing, is one minor obligation among many often larger obligations. From a strategist perspective, individuals contributing by participating can be referred to as *strategy participants*.

A third division is related to the definition of strategist. Several studies define strategist related to individuals' perception of themselves as strategists (e.g. Dameron and Torset, 2014; Mantere, 2005; Mantere and Whittington, 2020; Shotter, 2006); strategist is therefore used interchangeably with the characteristic being strategic (Besson and Mahieu, 2011). Hence, the definition of strategist is not related to their formal role, cf. *strategy professionals*, executives or not; nor is it related to their participation in formal organizational strategizing, cf. *strategy participants*. This group can be described as a third overarching category of strategists: *strategic individuals*.

While strategy professionals and strategy participants are mutually exclusive, as are executives and non-executives, strategic individuals is a wide term describing any individual perceiving themselves as being strategic, executive or non-executive, professional or participant.

2.2 Strategists' strategizing

As previous studies define strategists differently, *how* they strategize differ. By sorting previous studies, based on the different types of strategists, we can advance our understanding of the activities they engage in and how.

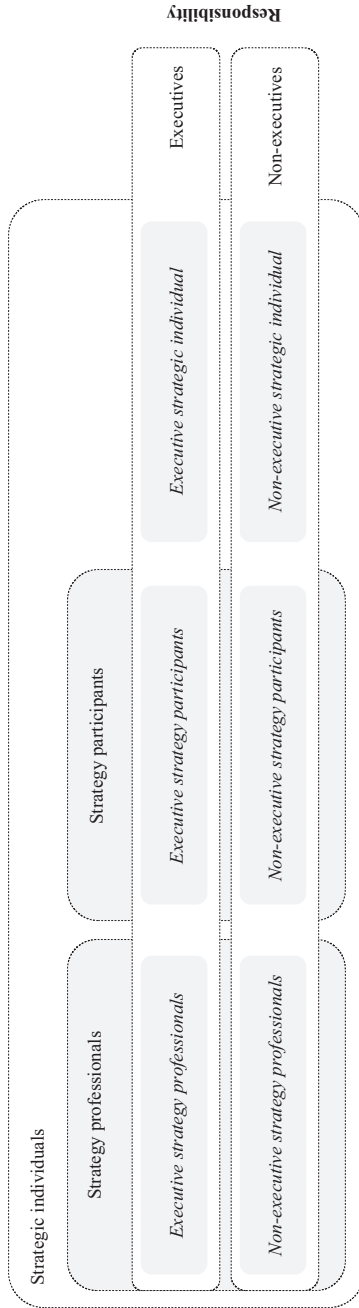


Figure 1. Six types of strategists

A number of studies explore how strategists strategize explore *executive strategy professionals*. For instance, [Menz and Scheef \(2014\)](#) investigated Chief Strategy Officers (CSO) in large corporations and conclude that the CSO's core role comprises the management of the firm's strategizing, e.g. competitive analysis, long-range planning, managing internal and external alliances and monitoring strategy realization. Similarly, [Breene et al. \(2007\)](#) investigated the CSO and [Angwin et al. \(2009\)](#) explore senior strategy managers, e.g. executive vice president of corporate development. Both studies conclude that important activities are consolidating different organizational units' strategic plans to an overarching level and supporting heads of units in clarifying a common strategic agenda (i.e. vertical intervention, e.g. [Collis et al., 2007](#); [Landau and Bock, 2013](#)). Another essential issue is strategy execution as it pertains to corporate development activities, e.g. managing strategic initiatives. In a related vein, [Jackson \(2009\)](#) urges CSOs to engage in lateral work for the better of the entirety of the organization, and thus views the CSO as a central and unifying force of the firm. Indeed, strategizing is done differently in the center compared to the periphery ([Regnér, 2003](#)). Thus, centrality is an important distinction in regard to strategy professionals. Previous studies are primarily focusing the center.

As for how *strategy participants* strategize, two research streams provide insights: studies on top management teams and strategy-as-practice studies. In the first stream, both former and recent studies, show how *executive strategy participants*, make decisions, set directives and goals, and provide advice (e.g. [Andrews, 1971](#); [Gavetti and Rivkin, 2007](#); [Hambrick and Mason, 1984](#); [Hunsicker, 1980](#); [Van den Steen, 2018](#)). In these studies, a central proposition is often that execution of strategy is defined as a decision. With such a view these executives sometimes forget, or disregard, subordinates' duties and step in too far ([Stiles and Taylor, 2001](#)). Other studies therefore emphasize communication and dynamics in strategizing, stressing that executives need to open up for two-way communication ([Hendry et al., 2010](#)) and keep a frequent dialogue with the business ([Gupta and Govindarajan, 2000](#)) as this enables knowledge transfer between units in the multi-business firm ([Lee et al., 2008](#)). In the second stream, [Jarzabkowski \(2005\)](#) proposes two practices under which strategizing activities can be sorted: *Procedural practices*, e.g. formalized cycles, plans, and quarterly reviews; and *interactive practices*, e.g. face-to-face communication and social exchange. As these practices describe strategists – in a broad sense – the activities regard both strategy participants and strategy professionals, executives and non-executives. Also [Mantere \(2005\)](#) provides a classification with three central groups of activities explaining strategists' strategizing: First, *strategy formation*: communicating and explaining (cf. engaging in strategic dialogue; [Samra-Fredriks, 2003](#)), crafting and diffusing a message to “reach” stakeholders ([Rouleau, 2005](#)). Second, *organizing*: defining and negotiating tasks and assignments ([Rouleau and Balogun, 2011](#)). Finally, *control*: practices for performance evaluation, resource mobilization, rewarding and participation ([Rouleau and Balogun, 2011](#); [Floyd and Wooldridge, 1997](#)). To take part in these activities one central arena, for both executives ([Hodgkinson et al., 2006](#)) and non-executives ([Healy et al., 2015](#)), is workshops. As strategizing (e.g. in workshops) sets parameters and decreases degrees of freedom, participants frequently resist and act in self-interest to influence strategizing ([Jarzabkowski and Balogun, 2009](#); [Mantere and Vaara, 2008](#)). Relatedly, other studies suggest that strategists negotiate ([Jarzabkowski and Balogun, 2009](#)) and strategize incrementally ([Quinn, 1980](#)) to lessen inherent risks of conflicts and resistance to central strategizing activities.

As noted, abovementioned studies on strategists implicitly show account also for how *non-executive strategy professionals* strategize (e.g. making decisions, communicating). Regarding specific focus on non-executive strategy professionals, [Whittington et al. \(2017\)](#) provides a first steppingstone. Their study explains changing job characteristics of strategic planners (“or similar”). In the analysis of job advertisements from 1960 to 2000 they conclude

that strategic planners are being increasingly decentralized; arguably, as a result of the difficulties for central units to stay close to the ground. They show how strategic planners were expected to engage in extensive forecasting, economics and analysis, despite evidence that strategic planning has to be more continual, open and intertwined with realization to better deal with changing environments (Mintzberg, 1994; Wilson, 1994).

Building on this theoretical understanding, Table 1 presents an overview of the different types of strategists, their definitions and the specific and general activities they engage in.

In conclusion, previous studies have investigated strategists. This paper turns attention to strategy professionals. In contrast to much strategy professionals research, exploring central senior management, emphasizing strategy formulation, this study focuses on non-executives, central and peripheral, and investigates strategizing to embrace the entire strategy process.

Type of strategist	Definition	Specific activities by type	General activities strategists
Executive strategy professional	Senior manager with executive responsibility, employed to spend the main part of their work on strategizing	Competitive analysis; Long range planning; Managing internal and external alliances; Monitoring strategy realization; Consolidating units strategy plans; Supporting heads of units; Managing strategy initiatives; Engage in lateral work; Set directives and goals, and Provide advice	Make decisions. Think and act strategically'; Formalizing cycles, plans, reviews; Communicate; Negotiate (tasks and assignments); Explain issues to stakeholders; Crafting and diffusing message; Defining tasks; Evaluate performance: Mobilize resources: Reward; Participate in strategizing; Resist; Act in self-interest: Employ participation: Engage in dialogue: Negotiate; Strategize incrementally
Non-executive strategy professional	Manager or employee with limited or no executive responsibility, employed to spend the main part of their work on strategizing	Forecasting; Economics; Analysis	
Executive strategy participant	Senior manager with executive responsibility, participating in the organization's state sizing	Step in too far; Enable knowledge transfer, open up for two-way communication, keep a frequent dialogue with the businesses	
Non-executive strategy participant	Manager or employee with limited or no executive responsibility, participating in the organization's state sizing		
Executive strategy individual	Senior manager with executive responsibility, identifying themselves as being strategic		
Non-executive strategy individual	Manager or employee with limited or no executive responsibility, identifying themselves as being strategic		

Table 1. Types of strategists, definitions and activities

3. Method

3.1 Research design and setting

This study investigated *how non-executive strategy professionals in multi-business firms strategize*. It was characterized by a phenomenon driven (Schwarz and Stensaker, 2014), immersed participatory insider approach with retrospective reflection and theorizing. A single case study design was motivated by unique privileged organizational access (Johnson *et al.*, 2003; Siggelkow, 2007). The design was built upon the use of an exploratory approach (Stake, 1995) of the ethnographic type (Atkinson and Hammersley, 1994) which offered an empirical closeness (Mintzberg, 1979; Whittington *et al.*, 2006) and fine-grained data, collected in its context as strategizing was performed.

The setting of the study was an engineering, construction and real estate group (E&C) employing nearly 10,000. The organization had eleven distinct businesses that combined covered the entire engineering and construction supply chain from land bank management, project development, building, to facilities management. The businesses were largely independent in operations but to a certain extent governed by central functions (e.g. strategy): a typical multi-business firm (Chandler, 1991). When the study commenced, the organization's businesses had been growing individually for more than a decade. Increasing competition from international competitors and decreased market shares triggered the launch of a corporate strategy initiative governed by the top management team of E&C to increase alignment. The author of this paper was assigned to manage the initiative.

The part of the initiative studied, was to formulate business strategies for the eleven businesses starting in the existing corporate strategy. This consisted of six "focus areas" with 4 targets each: finance (e.g. profitability), safety (e.g. lost time injuries), customers (e.g. market share), operational excellence (e.g. capacity), sustainability (e.g. green revenue) and human capital (e.g. leadership index). The work was done as parts of the yearly strategy formation cycle and the two groups of non-executive strategy professionals performing the work were in focus: first, a centrally employed *Corporate strategy team* of seven individuals: a strategy portfolio and change manager (the author), a strategy controller, two business analysts, two strategy managers and one financial analyst; and second, eleven *Business development managers* employed in the individual businesses. This division follows how they were clustered in the organization (i.e. central/corporate and peripheral/business) and in accordance with the literature.

3.2 Research process

The research process had two distinct phases: first, data production and collection, during the initiative and the author's fulltime employment at E&C; second, data analysis starting after the initiative had been finalized, and the author's formal employment at the firm was ended.

3.2.1 Data production and collection. Data used in this study was not merely collected from the organization, but in part developed together with the organization's employees (e.g. performing and participating in workshops). The data collection phase was thus also a data production phase, and the author was present throughout all instances of this process. The study draws upon a broad range of data sources (Table 2) from all businesses and all hierarchical levels (except blue collar) adding validity to data (Denzin and Lincoln, 1994).

Data production and collection was performed in seven steps. First, existing strategy documentation was collected. This established a current state of strategy. Second, the Top management team (TMT), Corporate strategy team (CST), Business development managers (BDM), heads of controlling and Business Directors were interviewed to provide an understanding of expectations on the strategizing and outcomes. Third, workshops in the businesses were facilitated by the corporate strategy team. Participants in all businesses'

Table 2.
Data sources

Data source	Details	Quantity
Strategy documentation	Strategies (group and businesses), scorecards (group and businesses) and other reports	128 A4-pages
Interviews	Top Management Team members (9 individuals). Corporate Strategy Team members (6), Business Development Managers (11), Heads of Controlling (3), Business Directors (11)	298 A4-pages
Business workshop documentation	Business model canvases (BMC) as work in progress and as finalized. Each business had one slide deck in which the nine elements in the BMC had one slide each	198 Power point slides
Strategy team workshop documentation	Activity systems (32 slides) and Strategy maps (11 slides) for each business. Each business had deck with the 2–3 Activity system slides and one Strategy map slide	43 Power point slides
Meeting minutes from TMT-meetings	Adjusted meeting minutes from 18 steering committee meetings, performed 3–6 h every six to eight weeks	108 A4-pages
Corporate strategy team members' calendars	Calendars posts including activities and related information (e.g. purpose, participants)	2,860 calendar posts
Observational field notes	Personal notes from interviews, workshops, TMT-meetings; occasional meetings and general reflections	146 A4-pages

workshops were the BDM, the Business Director and the head of controlling for that particular business. Additional participants include different specialists depending on the business, e.g. Marketing manager, HR-manager, etc. The Business model canvas (Osterwalder and Pigneur, 2010) was used to discuss and document the business's strategy and was sent out for feedback. This data described the participants' view on, and issues, in the businesses. Fourth, the CST had internal workshops to assemble and analyze the collected strategy documentation and interview data. Activity systems (Porter, 1996) and Strategy maps (Kaplan and Norton, 2000) were used. This documentation helped verify/clarify concerns in other data sources. Fifth, TMT meetings were participated and the minutes from these collected. These data described the TMTs key issues. Sixth, the CST members' calendars were collected to understand the attention paid to different issues, units, meetings etc. Finally, observational field notes were taken by the author throughout the entire process. These covered initial remarks on, and analyses of, issues discussed in interviews, workshops and meetings. They added depth to interview and workshop data and/or provided initial paths for analyses.

3.2.2 Data analysis. Data were analyzed in retrospective, after all data was produced and collected, and the studied initiative was finalized and followed three stages (Miles and Huberman, 1994): data compilation, data display and data analysis, performed iteratively (Dubois and Gadde, 2002).

First, data were compiled into one dataset. A first exploration of data was performed to assess explanatory value. Interviews with, e.g. the top management team (TMT) and minutes from TMT meetings explained expectations on the non-executive strategy professionals. Interviews with the corporate strategy team (CST) and the Business development managers explained their work. The calendars of the CST members showed tasks and time spent. Field notes provided explanations and were primarily used to verify data from interviews, minutes and calendars. Workshop material and strategy documentation were used to build context.

Second, data were displayed in spreadsheets: six rows described key areas of the non-strategy professionals: roles (e.g. assignments), responsibilities (e.g. position, mandate), expectations (e.g. wishes); activities (e.g. tasks, events), issues (e.g. content) and output (e.g. strategies). The first column described raw data and the second described tentative findings.

Finally, analyzing data involved manual coding to identify patterns (Gioia *et al.*, 2012). In the first round of the analysis, raw data was reviewed to capture insights across the six displayed areas. This ended up in a provisional description of the non-executive strategy professionals strategizing. Feedback from respondents was sought and received (Thomas, 2017). In the second round, researcher-centric themes that could connect raw data to theoretic concepts were added in a third column in the spreadsheets. For instance, “involve others” was linked to *participation*. The third round consisted of identifying consistencies and inconsistencies in the different sources of data (Winch, 1958) to refine the identified patterns based on triangulations of data sources and theory (Denzin and Lincoln, 1994; Yin, 2013). In some instances, existing terms explained the patterns (e.g. *strategy professional*); in others, elaborations where needed to reflect the data (e.g. *strategizing orientation*).

The authors employment provided an understanding of underlying systems and values critical for an accurate interpretation of data (Arino and de la Torre, 1998). To lessen the risk for post rationalization, peer debriefing from two outside researchers was used (Johnson *et al.*, 2007).

4. Findings

4.1 Strategists at E&C

To put the non-executive strategy professionals in context, the paper firsts zooms out and relates them to the wider concept “strategist.” Table 3 provides an overview of the strategy participants and strategy professionals in the studied initiative.

Data shows that 607 individuals across the organization were participating in strategizing (e.g. participating in workshops). Their contribution was limited to participating and they could thus be considered *strategy participants: executive strategy participants* (e.g. Senior Vice Presidents, Business Directors) and *non-executive strategy participants* (e.g. Project Managers, Controllers) depending on their executive responsibility. As for professionals, one unexpected finding was that no *executive strategy professional* existed in E&C. The closest to such a role, was the Chief Financial Officer (CFO) who was responsible for all management, reporting and accounting processes. Although he spent time on strategizing (e.g. strategic planning, business reviews), this was not the main part of his job. He was not employed to manage the firm’s strategizing. The *non-executive strategy professionals* were 18 individuals represented in two distinct groups: the centrally employed Corporate Strategy Team, consisting of seven individuals with different formal positions, and one Business Development Manager employed in each of the eleven separate businesses.

Type of strategist	Roles in E&C (quantity)
Executive strategy participants	Senior vice presidents (3), Chief operating officer, Chief financial officer, Chief executive officer, Business directors (11), HR-Director, Vice Presidents (7), Heads of controlling (3), District managers (60)
Non-executive strategy participants	Project managers (226), Product managers (4), Marketing managers (10), Data analysts (2), HR Business partners (14), Controllers (25), Procurement managers (10), HSE managers (12), Production managers (216)
Non-executive strategy professionals	Business development managers (11), Corporate strategy team members: Strategy managers (2), Strategy portfolio and change manager, Strategy controller, Business analysts, financial analyst
Executive strategy professional	

Table 3.
Overview of strategy participants and professionals

4.2 Non-executive strategy professionals strategizing in E&C

Much of the strategizing of two groups of non-executive strategy professionals – the Corporate Strategy Team (CST) and the Business development managers (BDMs) – was similar: both groups engaged in strategizing activities described in the literature (e.g. formalize cycles, plans, communicate); both groups also engaged in several activities that in theory, typically, are executive strategy professionals’ responsibility (e.g. long-range planning, managing strategic initiatives).

Notwithstanding the similarities, the two non-executive strategy professional groups differed in activities they engaged in. Whereas the BDMs engaged in forecasting, economics and analysis, the CST did not. Instead, they employed participation, negotiated, strategized incrementally and engaged in lateral work. Table 4 provides an overview of the activities the two non-executive strategy professionals engaged in.

These differences in activities illustrate the significantly different orientations in the two groups’ strategizing. The BDMs strategizing could be described as exclusive, top-down strategic planning with separate *strategy formulation* and *strategy realization* phases focusing on strategy content. The CST’s strategizing was characterized by inclusion, bottom-up contribution and management of strategizing in three iterative phases: first, *developing strategizing*, including designing and improving the organization’s strategizing; second, *implementing strategizing*, ensuring the strategizing processes were known and accessible in the group; and third, *facilitating strategizing*, arranging, coordinating and leading activities across organizational entities to support and cooperate with them in strategizing.

The analysis show this difference in strategizing orientations, depended on two main factors: the organizational location and the experience of the non-executive strategy professionals.

4.3 Organizational location of the non-executive strategy professionals

The organizational location of non-executive strategy professionals made a difference on the two different groups’ strategizing in two interconnected respects: centrality and hierarchy. The businesses in the firm had large degrees of freedom. By tradition, they were free to act as long as they delivered financial results. Strategizing in the businesses – and in the group – had thus developed primarily from a business strategy level perspective. This was generally appreciated as it was deemed to set a clear focus and control over what should be done in the individual businesses. In this decentralized organization, the BDMs reported to the Business Director of their respective business. They had no “dotted line” to the any staff function. Consequently, the BDMs strategizing was characterized by business analysis, planning, forecasting, setting goals and directives together with their respective management teams (*executive strategy participants*) and then communicating it to the business for realization.

As noted, there was “little” corporate strategy guiding the businesses’ strategizing. Historically, the businesses considered staff a liability. Nonetheless, the Top Management

Activities	Business development managers	Corporate strategy team
Activities that differed	Forecasting; Economics; Analysis Set directives and goals	Employ participation; Negotiate; Strategize incrementally; Engage in lateral work; Consolidating units’ strategies; keep a frequent dialogue with businesses Apply heuristics Evaluate performance
Activities both engaged in	Competitive analysis; Formalize cycles, plans, reviews; Communicate; Negotiate (tasks and assignments); Explain issues to stakeholders; Crafting and diffusing message; Mobilize resources; Reward; Resist Act in self-interest; Managing strategic initiatives; Long range planning; Supporting heads of units	Provide Advice

Table 4.
Non-executive strategy
professionals’ activities

Team (TMT; *executive strategy participants*) with the CFO (the closest an *executive strategy professional*) as main advocate, had an ambition to align the group. The employment of the CST was one of many measures to achieve this. The members of the CST were placed centrally, below the CFO. Although having individual duties based on competencies, their collective responsibility was being a corporate strategy function. Initially, and as a result of the large degree of decentralization, the CST had no formal communication channels to the businesses. Thus, the CST's counterpart was the TMT. For the BDMs, it was their respective management team. Since the Business Directors were not members of the TMT, but reported to a member of the TMT, the "distance" between the CST and the BDMs (*corporate central and business peripheral non-executive strategy professionals*) was large.

The two *non-executive strategy professional* groups were both employed to support strategy development and provide advice to their respective management teams: the CST supported the TMT and the BDMs supported their business management teams. Both corporate and business management teams were populated by *executive strategy participants* and neither had an *executive strategy professional*. In that sense, both the BDMs and the CST were a leading authority on strategy in their respective domains. Neither of the groups had any formal guidance, principles, routines or methods etc. regarding how to strategize. They also had no explicit responsibility to ensure "proper" or "similar" strategizing was done. Consequently, strategizing was performed with large degrees of freedom and in different ways, and initially with a primary focus on strategy content.

The differences in the businesses' strategizing were noticed by the CST after only a few interviews. These differences were explained and discussed at meetings between the CST and the TMT. Gradually, and unconsidered, the CST slowly shifted focus from corporate strategy content to managing and coordinating strategizing across the businesses. The analysis show this shift was initially not a result of explicitly directed responsibilities to the CST, but a result of lessons learned from interviews and workshops, an interest from BDMs to know how other businesses were strategizing, and an increased attention paid to strategizing on the TMT-meetings. In retrospect, one expression uttered casually by the Chief Operating Officer was important: "There ought to be best practices in strategy too, right?". This was later used by several TMT members in dialogues with the businesses about future strategizing. It also led the CST to interpret they could align strategizing across the firm.

The practical consequences of this unspoken new orientation, however, caused four Business Directors (*executive strategy participants*) to express dissatisfaction back to their bosses, Senior Vice Presidents in the TMT. They brought it to a TMT meeting, and a heated discussion regarding different opinion as to what strategy should be took place. Two statements illustrate the two opposing views:

From all I've read, a clear focus in strategy is pretty much everything... and now we [the TMT] should leave that and focus on how to strategize?! Let them [businesses] do strategy as they wish. I want results, not compliance. Senior Vice President Building

But you get the point!? Setting a clear focus for the entire firm demands some kind of common working method. Across all the businesses. They want to contribute; they will not just sit there "eating bananas" [air quotes] because we do not tell them what to do. Senior Vice President Civil

With some reservation, the TMT decided to make strategizing in the organization more common. At this meeting (eight months into the initiative) the TMT explicitly asked the CST to develop and align processes, tools and methods of strategizing in the organization (to get closer to an alleged "best practice"). This new orientation, the CST's mandate and any expectations (explicit or implicit) on the BDMs to aid in developing best practices, however, did not reach the BDMs. Data show that their less central organizational location (in the business) and low degree of formal communication from the TMT to the Businesses

Directors, and in extension to the BDMs, caused this change to be uncommunicated to them. Consequently, the BDMs continued to strategize as previously, act in self-interest and on some accounts resisted to change.

This led to conflicts, discussions and negotiations between the BDMs and the CST. The formation of somewhat formal communication channels and a forum with bimonthly meetings between the two were concrete results of these discussions. The analysis also show these discussions helped identify changes that obtruded less on the BDMs strategizing, and yet supported some common methods and tools. The less the changes obtruded, the easier they were accepted by the BDMs – and vice versa. In fact, several minor changes, such as the use of a certain tool, e.g. Business model canvas, were welcomed and reinforced by all businesses. The analysis also show that these discussions and negotiations between the groups reinforced the CST's already increased process focus, which in turn led to a decreased opposition to changes in strategizing by the BDMs. In some sense, responsibilities crystalized between the CST (i.e. *central corporate non-executive strategy professionals*) and the BDMs (i.e. *peripheral business non-executive strategy professionals*) in the division between process (e.g. tools), primarily owned by the CST, and content (e.g. goals, plans), primarily owned by the BDMs.

The understanding of this division is illustrated by two statements: First, a Strategy Manager (*central corporate non-executive strategy professional*) asking the CFO about the mandate of changing strategizing:

OK, so can we decide that all businesses will have to work as we propose? They seem to understand we dont care about what they come up with business wise – more or less – as long as they work as we all do in the entire group, and *with* us at corporate, not by themselves, in their own ways.

Second, a seasoned Business Development Manager (*business peripheral non-executive strategy professional*) reluctantly accepts the new ways of strategizing to another Strategy Manager (*central corporate non-executive strategy professional*):

So, we will not be able to strategize as we wish, because it's a corporate alignment-thing. . . But if we "do as you say" [air quotes], our [businesses] strategy, is ours? And you will not barge in, and tell us what to do, in terms of decisions?

In practice, this way of strategizing made the corporate strategizing process closely related to the business strategy formulation processes; these two were performed concurrently in collaboration between the CST and the BDMs. In that sense, as one part of the alignment of the group, the CST did not just lay out processes and plans for the businesses to use or adhere to, but engaged in leading workshops and meetings in the businesses where the BDMs were engaged as "owners" of such strategizing activities.

4.4 *The experience of the non-executive strategy professionals*

The analysis show that experience of the non-executive strategy professionals also made a difference on the two different groups' strategizing. The BDMs were all previous senior managers from their particular line of business (or a closely related one) and had extensive experience from the industry – from 20 to 38 years. They, and their respective business management teams, perceived they had enough knowledge regarding conditions to, as one Business Director put it, "formulate a strong strategy". In contrast, the CST members had no such experience and, in comparison to the BDMs, limited firm specific knowledge. This made it difficult for them to formulate "good" strategy content. The CST members' background differed: telecom, finance, IT and manufacturing, and a total working experience that ranged from 4 to 15 years. Five of them had experience from management consultancies.

The CST's relative inexperience led to a strategizing orientation based on an ambition to "leverage on the knowledge of the individuals in the organization," the Chief Executive Officer's words voiced at the third TMT-meeting with the CST. It guided the CST in their assignment and over time reinforced the process focus that crystalized as a result of the discussions regarding the decentralized organization (as discussed above). In the CST's early discussions with the Business Directors and Heads of Controlling (*executive strategy participants*), how strategizing should be done to harvest the organization's collective knowledge and concurrently increase ownership of strategy in the businesses, participation was a central theme. This was fed back to the TMT which made a decision to employ a broader participation: all hierarchical levels, all businesses and all support functions in the group should be involved. An explicit "rule of thumb-ambition" was to involve 15 % of the employees in the individual businesses and the CST was responsible to ensure this.

The CSTs focus on participation, supported their focus on process. Interview data with Business Directors, District Managers (*executive strategy participants*), Project Managers, Controllers (*non-executive strategy participants*), BDMs and the CST (*non-executive strategy professionals*) and calendar data show that the CST spent more time on discussing how strategizing should be done, than what strategy alternatives to pursue. In addition, focus of discussions in the beginning of meetings, was almost always how to "make strategy happen" (a common expression in the organization). Thereafter discussions about strategy content sometimes commenced. However, the CST often felt they had little to contribute pertaining to strategy content due to their limited experience. Their business specific knowledge was far less than the BDMs and Business Directors, and therefore suggestions were often already thought of, or could easily be dismissed, backed up by facts.

Instead, the CST managed the strategizing process, ensured members of the organization participated and contributed to develop strategy content: data show that the CST performed 112 interviews; conducted 22 strategy workshops with the eleven businesses and managed three projects with broad participation: "Corporate synergies", "A new corporate strategy process" and "Business Intelligence-strategy". Further, the CST spent half a day every six weeks discussing, explaining and sorting out strategy issues with the TMT, and held hundreds informal meetings with BDMs and Business Directors to discuss and negotiate strategizing activities.

This contrasts with the BDMs' strategizing orientation. They did less workshopping (almost none); they primarily had meetings with fewer participants, mainly their management teams (*executive strategy participants*); they managed less projects. Instead, they set goals and directives, and used the chain of command to influence managers and staff in the businesses at the instance of their respective Business Director. In communication, spontaneous talks in the hallway were more common than "formal" interviews. Sampling was done based on personal relations and an individual opinion of "who gets things done", rather than trying to draw on the firm's collective knowledge, which was the CST's rationale for inclusive strategizing.

5. Discussion

This paper set out to explore how non-executive strategy professionals in multi-business firms strategize. The findings show there are two types of such professionals that differ in orientation in strategizing depending on their organizational location and experience.

5.1 The organizational location of non-executive strategy professionals

In the multi-business firm there is typically a central corporate entity guiding the businesses (Chandler, 1991). Different types of multi-business firms are differently integrated

(e.g. centralized). The studied firm was decentralized and employed both *central corporate non-executive strategy professionals* and *peripheral business non-executive strategy professionals*. Previous research suggests a central vs. peripheral organizational location of strategists is important to consider (Grant, 2003; Regnér, 2003; Whittington *et al.*, 2017). Indeed, this is supported. However, non-executive strategy professionals in the businesses in the multi-business firm, are also typically somewhat centrally located, in each business. Particularly if compared to strategy participants who are often more peripheral. This study therefore suggests that in multi-business firms' strategizing, *degrees of centrality*, e.g. adding semi-central and semi-peripheral to central *or* peripheral, is appropriate to describe the location of non-executive strategy professionals.

Employing centrally located strategists have benefits, e.g. alignment (Jarzabkowski and Balogun, 2009; Watson and Wooldridge, 2005) and drawbacks, e.g. risks separating strategy from the businesses (Kiechel, 2010; Montgomery, 2012) and decreased business responsiveness (Wadström, 2018) as such strategists may be too far from the businesses' changing environments (Grant, 2003; Wilson, 1994). This study supports and extends both these notions. In the case, the central corporate non-executive strategy professionals focused on managing and facilitating strategizing inclusively (e.g. Hautz *et al.*, 2017; Whittington *et al.*, 2011). They employed participation (Rouleau and Balogun, 2011; Floyd and Wooldridge, 1997), kept a frequent dialogue with the businesses (Gupta and Govindarajan, 2000) and engaged in lateral work (Jackson, 2009). They progressed incrementally (Quinn, 1980) and continuously negotiated (Jarzabkowski and Balogun, 2009) with the peripheral business non-executive strategy professionals, and executive and non-executive strategy participants in the businesses. The peripheral business non-executive strategy professionals, on the other hand, (semi-central/"central" in their businesses), engaged in forecasting, economics and analysis (Whittington *et al.*, 2017) to set clear goals and directives (e.g. Hambrick and Mason, 1984; Van den Steen, 2018) for the different parts of the businesses. They sparsely negotiated or communicated with more peripheral parts of the business.

These activities of the two groups of non-executive strategy professionals illustrate two different *strategizing orientations*: inclusive process orientation and exclusive content orientation. This study shows that an *inclusive process orientation* lessened risk for resistance, increased transfer of knowledge across the businesses (Lee *et al.*, 2008) and added value to the businesses through vertical intervention (e.g. Collis *et al.*, 2007; Landau and Bock, 2013). Further, central strategists that employ an inclusive process orientation create alignment (Jarzabkowski and Balogun, 2009), and may, in addition to a CSO, function as a centripetal force in divisionalized organizations (Jackson, 2009). In addition, this study argues an inclusive process orientation employed by central corporate non-executive strategy professionals may help "opening" (e.g. Mack and Szulanski, 2017; Whittington, 2019) strategizing and enable ownership of content, as representatives of the businesses are enforced to step in to formulate content.

Accordingly, abovementioned advantages of an inclusive process orientation are reduced if an *exclusive content orientation* is employed. However, while an inclusive process orientation is limited to aligning strategizing between the corporate center and the businesses, the exclusive content orientation provides also a content alignment. This in turn enables resource mobilization (Rouleau and Balogun, 2011; Floyd and Wooldridge, 1997) and unified direction of the organization. This benefit is less apparent in an inclusive process orientation. However, although content alignment is desirable, this study supports that it may lead central non-executive strategy professionals (e.g. central in one business of a multi-business firm) to emphasize central gains over responsiveness (Wadström, 2018).

Conclusively, the risks of centrally employed professionals, a separation between strategy and business or an impaired responsiveness is thus not given. This study suggests that such

separation and impaired responsiveness is influenced by non-executive strategy professionals orientation.

5.2 *The experience of non-executive strategy professionals*

Extensive management literature suggests our experiences influence our behavior (e.g. Simon, 1947; Walsh, 1995). This was seen regarding the orientation of the non-executive strategy professionals. Strategists are being increasingly employed (Müller-Stewens, 2020; Whittington *et al.*, 2017), and many are young professionals with consulting experiences (Angwin *et al.* (2009). This is confirmed and extended. The consulting experience of a majority of the central corporate non-executive strategy professionals and the limited experience in the specific businesses, and thereby less knowledge of the content, made them focus on process (e.g. models, phases, facilitation). This orientation differed from peripheral business non-executive strategy professionals, who had extensive experience from their industry, and who were eager to decide what to do. Consulting experience and limited experience in a business can thus create and reinforce non-executive strategy professionals' process orientation. Further, emphasizing process leads to an increased consideration of realization of strategy (as opposed to merely strategy formulation), which in turn, leads to more inclusive strategizing (Hautz *et al.*, 2017).

Conclusively, the study suggests, that both *type of experience* (e.g. consulting) and *extent of experience* (i.e. time) matter for non-executive strategy professionals' strategizing orientation. The greater the knowledge in strategy content, the easier for non-executive strategy professionals to assume a content orientation in strategizing, and the lesser the content knowledge, the easier to adopt a process orientation.

5.3 *Strategizing from non-executive strategy professionals' viewpoint*

The study shows that multi-business firm strategizing from a non-executive strategy professional's standpoint can be conceptualized as two streams of activities: one performed by central corporate non-executive strategy professional(s) and one performed by peripheral business non-executive strategy professional(s). The study also shows that such professionals can have two different strategizing orientations: exclusive content orientation and inclusive process orientation. In the studied case, the central corporate non-executive strategy professionals had an inclusive process orientation and the peripheral business non-executive strategy professionals had an exclusive content orientation (Figure 2).

The central corporate non-executive strategy professionals managed the organization's, and its incorporated businesses', strategizing. This stream was circular, performed annually and entailed three sequences: developing strategizing, implementing strategizing and facilitating strategizing. Activities performed include, e.g. managing alliances (Menz and Scheef, 2014), consolidating unit's plans (Angwin *et al.*, 2009; Breen *et al.*, 2007) and engaging laterally (Jackson, 2009). These activities are typically related to the executive strategy professional. Indeed, previous literature have pointed to an unclarity of responsibility of different strategists in strategizing (e.g. Hendry *et al.*, 2010; Van den Steen, 2018; Westley, 1990). This study argues that the absence of an executive strategy professional can be one reason to unclarity of roles in strategizing. Not all multi-business firms have an executive strategy professional. The CFO in the case firm was responsible for strategy, but by definition, he was not an executive strategy professional. In addition, the non-executive strategy professionals were responsible for planning and performing strategizing activities (i.e. formalizing cycles, plans, communicating, negotiating).

This paper therefore argues that strategy professionals responsibilities for managing strategy can be clarified by making a distinction between executive strategy professionals'

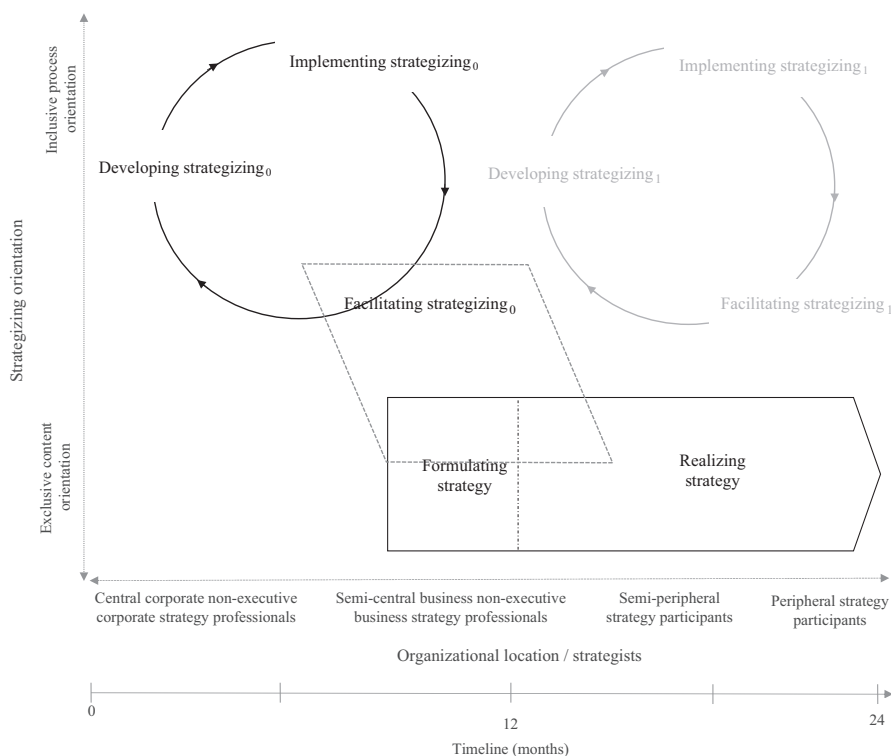


Figure 2. Non-executive strategy professionals strategizing as two streams

and non-executive strategy professionals' responsibilities. Drawing on [Barnard \(1969/1938\)](#), executive strategy professionals can be regarded as ultimately answerable for strategizing being performed in the organization (i.e. *strategizing accountability*); non-executive strategy professionals can be seen as answerable for performing strategizing in a "desired" way (i.e. *strategizing responsibility*).

These responsibilities are also applicable to the peripheral business non-executive strategy professionals' strategizing. In the case, the second stream was part of the same annual cycle as the first stream, but it was linear and sequential with one formulation phase and one realization phase. As processes were laid out on corporate level early spring, business strategy formulation started in the early fall to have set strategies and targets by the end of the year. The peripheral business non-executive strategy professionals were responsible for this stream, and the strategizing accountability was held by the central corporate non-executive strategy professional. Therefore, although theorized as two separate streams, one major result in this study is how tightly connected the two streams are in practice ([Watson and Wooldridge, 2005](#)). Central corporate non-executive strategy professionals and peripheral (or rather "semi-central") business non-executive strategy professional typically collaborate with other semi-peripheral and peripheral strategy participants (executives and non-executives). Central corporate non-executive strategy professionals' facilitating strategizing – whether active or passive – is concurrently one part of the peripheral business non-executive strategy professionals' strategy formulation. While the central corporate non-executive strategy professionals help the peripheral business non-executive strategy professionals in formulating content, the input from the businesses' professionals

helps the corporate professionals to develop strategizing in their next cycle. This has implications for the next year's business strategy process, and so on.

Summarizing the discussion, while the central corporate non-executive strategy professionals had an inclusive process orientation and the peripheral business non-executive strategy professionals had an exclusive content orientation in this case, this need not be true in other cases. Deductively, multi-business firms strategizing, from a non-executive strategy professionals standpoint, can be seen in four different ways: first, central corporate non-executive strategy professionals assume an inclusive process orientation and peripheral business non-executive strategy professionals assume an exclusive content orientation; second, central corporate non-executive strategy professionals and peripheral business non-executive strategy professionals both assume an exclusive content orientation; third, central corporate non-executive strategy professionals and peripheral business non-executive strategy professionals both assume an inclusive process orientation; and finally, central corporate non-executive strategy professionals assume an exclusive content orientation and peripheral business non-executive strategy professionals assume an inclusive process orientation. These four ways are illustrated in [Figure 3](#).

By conceptualizing strategizing from a non-executive strategy professional's perspective, this study shows how corporate and business level strategy, and strategy formulation and realization, are difficult to separate in multi-business firm strategizing. Existing literature provides us with valuable definitions of classical strategy distinctions (e.g. corporate versus business level strategy) that increase our understanding and help improve strategizing in practice. However, the insights from this study, illustrate a flaw in such a distinction: where does corporate strategizing end and business strategizing start?

6. Conclusion

While scholars have called for empirical research on strategists, it is still limited ([Jarzabkowski and Spee, 2009](#); [Vaara and Whittington, 2012](#)). The purpose of this study is to develop strategizing knowledge that increases our understanding of strategists' work in multi-business firms. The study results cluster into three main insights.

First, the study contributes to the literature on strategists (e.g. [Montgomery, 2012](#); [Müller-Stewens, 2020](#); [Van den Steen, 2018](#); [Watson, 2003](#)) by providing a framework defining different types of strategists (e.g. non-executive strategy professional), and shows how the framework can be applied to help zooming in on such types. Second, the study adds texture to knowledge on strategy professionals (e.g. [Mentz and Scheef, 2014](#); [Whittington, 2019](#); [Whittington et al., 2017](#)) by exploring empirically, and illustrating, how non-executive strategy professionals in multi-business firms strategize. Finally, the study extends the strategizing literature (e.g. [Jarzabkowski et al., 2007](#); [Vaara and Whittington, 2012](#); [Whittington et al., 2006](#)) by conceptualizing multi-business firm strategizing from a non-executive strategy professionals' perspective. These three contributions combined furnishes insights to develop the nascent research agenda on practitioners in strategizing, and partly inform literature on corporate strategizing (e.g. [Collis et al., 2007](#)) and open strategy (e.g. [Balogun and Rouleau, 2017](#); [Mack and Szulanski, 2017](#)).

There are also managerial insights derived from the study. Employing central corporate non-executive strategy professionals with a process orientation helps manage multi-business firm strategizing and supports three benefits: enabling strategizing alignment across the firm; ensuring participation in strategizing; and empowering ownership of strategy content in the businesses.

This exploratory single case study offers of a "thick" description and enhances theory which helps build a foundation for further research ([Yin, 2013](#)). However, the following

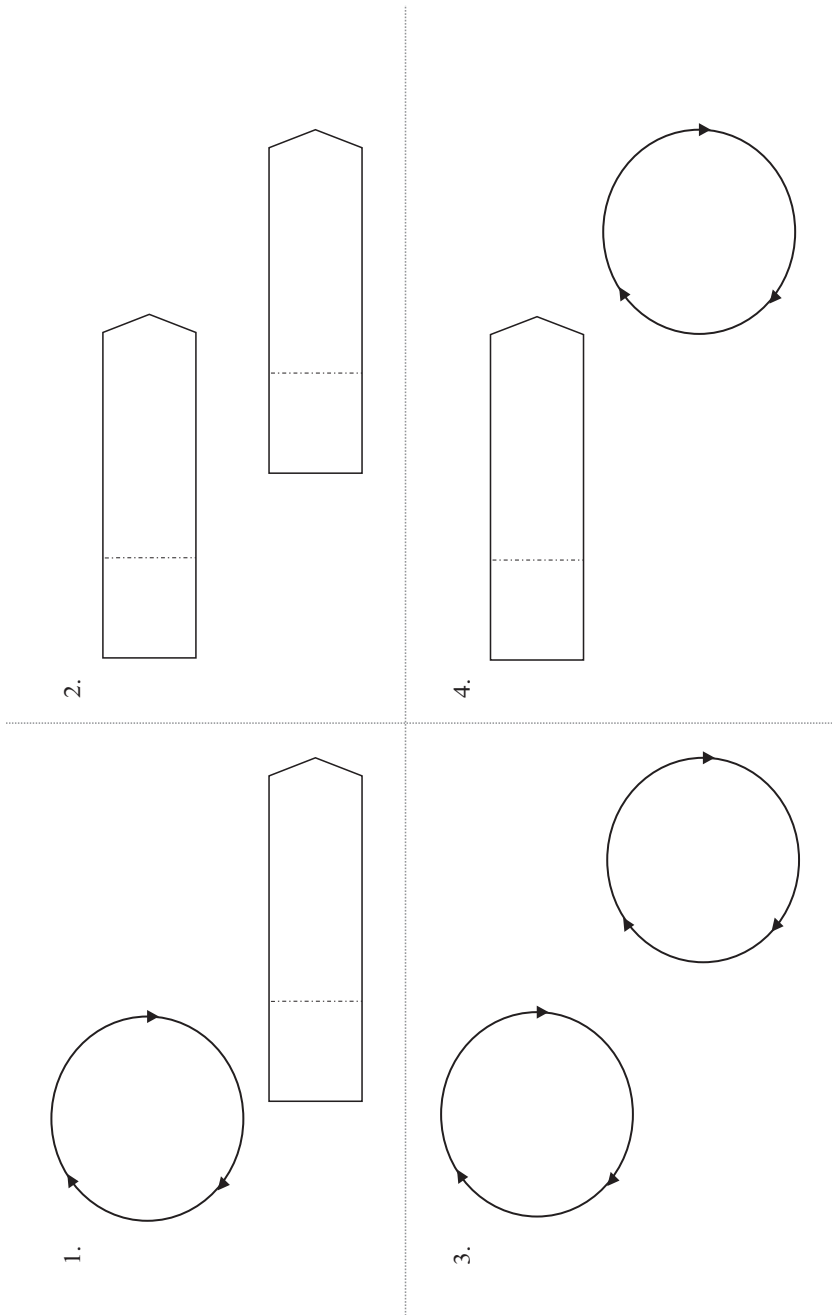


Figure 3. Four ways non-executive strategy professionals in multi-business firms strategize

limitations are acknowledged: the contexts in which this enhanced theory can be “useful” is related to the context of the study; the limited time frame (three years) did not allow for long-term effects, e.g. group competitiveness; and the studied strategists’ personal traits where not possible to explore. For further research, the development of the observed businesses over time would capture the dynamic characteristics of the different professionals and long-term effects. Also, tracking the quality of decisions would highlight different strategizing outcomes. Finally, exploring behavioral aspects would provide a deeper understanding of the strategists and their strategizing.

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