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# **BRIDGING PRACTICE AND PROCESS RESEARCH TO STUDY TRANSIENT MANIFESTATIONS OF STRATEGY**

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# **BRIDGING PRACTICE AND PROCESS RESEARCH TO STUDY TRANSIENT MANIFESTATIONS OF STRATEGY**

## **ABSTRACT**

At the intersection of Strategy Process (SP) and Strategy-as-Practice (SAP) research lies the focal phenomenon they share – strategy, which manifests itself in a variety of ways: intended, realized, deliberate, emergent, unrealized, and ephemeral strategy. We present a methodology comprised of three stages that, when integrated in the manner we suggest, permit a rich operationalization and tracking of strategy content for all manifestations. We illustrate the utility of our methodology for bridging SP and SAP research by theorizing practices that are more likely to give rise to unrealized and ephemeral strategy, identifying their likely consequences, and presenting a research agenda for studying these transient manifestations.

**KEYWORDS:** strategy process; strategy as practice; research methods

## INTRODUCTION

The relationship between Strategy Process (SP) and Strategy-as-Practice (SAP) research has been vigorously debated (see Hutzschenreuter & Kleindienst, 2006; Jarzabowski & Wilson, 2002; Whittington, 2007), even though these two vibrant research traditions share a focal phenomenon – strategy. SP research “is essentially concerned with choice processes (strategic decision-making) and implementation processes (strategic change)” and the critical role played by time and history therein, with a special focus on “action and context” (Pettigrew, 1992: 6 & 11). It emphasizes “three main elements: the strategists, the issue, and the sequence of actions” (Hutzschenreuter & Kleindienst, 2006: 676). SAP research represents “the study of strategy under the sociological eye” (Whittington, 2007: 1577) as an institutionalized social practice such that “the organization is de-centred, and people, practices and societies enter equally onto the stage” (Whittington, 2007: 1577 & 1578). It concerns itself with how things are done and by whom, emphasizing the people doing strategy work (practitioners) in their day-to-day activities (praxis), as well as the tools and methods (practices) they use i.e., “accepted ways of doing things, embodied and materially mediated, that are shared between actors and routinized over time” (Vaara & Whittington, 2012: 287).

We explore the intersection between the two approaches and develop a robust, systematic and integrated methodology for tracking strategy content that can be used in empirical settings by researchers from both traditions for mutual benefit and cumulative advancement. This novel methodology consists of three stages. The first operationalizes Burgelman’s (1983) concept of strategy to capture strategy as discourse. The second stage captures strategy as action by finding common ground between Porter (1996) and Mintzberg (1978) to identify patterns over time. The third stage involves an analysis of strategic consonance and dissonance (Burgelman & Grove,

1996), allowing researchers to distinguish induced from autonomous activity (Burgelman, 1983; Floyd & Lane, 2000; Floyd & Wooldridge, 2000). In respecting the nuanced, complex and multifaceted nature of strategy, acknowledging that the concept carries multiple meanings (Ronda-Pupo & Guerras-Martin, 2012), and recognizing that strategy content manifests itself in multiple ways (Mintzberg & Waters, 1985), this methodology makes important contributions.

First, our methodology allows researchers to track intended, deliberate, realized, unrealized, emergent (Mintzberg & Waters, 1985) and ephemeral (Mirabeau & Maguire, 2014) manifestations of strategy in a single study. This is critical because SP and SAP researchers are interested in the complexity and richness of strategy, and even researchers whose main interest is in a single manifestation can enrich their understanding by engaging with other manifestations because of the temporal and conceptual relationships among them. Second, our methodology is particularly useful for researchers to document and study unrealized and ephemeral strategy, which present significant methodological challenges because they unfold over just a short period of time and leave few traces. In providing a systematic and comprehensive way to track these transient manifestations, which have been largely ignored in the literature, our methodology overcomes the limitations of existing methods. In so doing, it lays the groundwork for SP and SAP researchers to develop a better understanding of transience in strategy content, which is also important for practitioners to learn how and why their strategic activity may fail to endure. Third, we make a conceptual contribution by illustrating how our methodology can be applied to study the transient manifestations of strategy. We do so by combining it with the variation-selection-retention (V-S-R) framework that is well established in the SP literature (Barnett & Burgelman, 1996; Burgelman, 1996), and with insights about practices from SAP researchers. In this way, we are able to theorize practices that are more likely to give rise to the two transient

manifestations of strategy, as well as identify their likely consequences for organizations. Our final contribution is to highlight the potential for bridging SP and SAP perspectives through this meta-analytical scheme based on the six different manifestations of strategy and the temporal and conceptual relations among them. In this way, we help strategy researchers meet their aspirations to “uncover the neglected, the unexpected and the unintended ... to broaden radically our vision of what strategy is” (Whittington, 2007: 1577).

The paper is organized as follows. Section One provides a brief overview of how SP and SAP studies have conceptualized strategy, and concludes by noting the methodological challenges facing researchers when studying the various manifestations of strategy. In Section Two, we present our methodology comprised of three integrated stages that, together, permit a rich operationalization of all six manifestations. In Section Three, we illustrate how our methodology can be used to study the particular cases of unintended and ephemeral strategy. We theorize the practices that are likely to give rise to these transient manifestations of strategy; discuss their consequences; and present a research agenda for advancing knowledge about them by leveraging our methodology in combination with other methods used by SP and SAP researchers. Finally, we review our contributions in the Conclusion.

## **SECTION ONE: TWO TRADITIONS IN STRATEGY RESEARCH**

### **Strategy process research**

SP research “is concerned with understanding how organizational strategies are formulated and implemented and the processes of strategic change” (Van de Ven, 1992: 169). It developed in contrast to “the better established and more voluminous subfield of strategy content research” (Pettigrew, 1992: 6). The strategy content literature is concerned with theorizing positions that result in optimal performance in different competitive environments (Chakravarthy

& Doz, 1992), typically with reference to the concept of competitive advantage (Sminia & De Rond, 2012). In contrast, SP research is concerned with describing and explaining specific decision and event sequences, as well as the activities of strategists as they engage with issues, that give rise to continuity or change in strategy content over time (Pettigrew, 1992).

One way of thinking about SP research is in terms of antecedents and outcomes, in addition to aspects of the strategy process itself (Hutzschenreuter & Kleindienst, 2006). Many studies explore links between specific strategy processes and the contextual factors and organizational characteristics that shape them as antecedents, or are, in turn, shaped by them as outcomes, including performance. Other studies explore the strategy process per se, opening this ‘black box’ to describe the roles played by strategists’ personalities, characteristics, and cognitive frames as they interact with issues to shape which actions are taken and how events unfold as strategy is formulated and implemented (Hutzschenreuter & Kleindienst, 2006).

One of the most significant contributions of SP research has been to problematize the distinction between formulation and implementation of particular strategy content. Mintzberg & McHugh’s (1985) work on strategy making at the National Film Board of Canada introduced the concept of *emergent* strategy to describe patterned organizational action over time in the absence of or even despite prior strategic intent. Mintzberg and Waters (1985) theorized four additional manifestations. *Intended* strategy i.e., those strategic actions planned by senior managers which, if they are translated successfully into sustained action, become *deliberate* strategy. In the event that they do not, perhaps because plans change or new projects meet resistance, the strategy is *unrealized* – a transient manifestation of strategy implying intended strategy content that does not endure in action. *Realized* strategy, which refers to patterned action over time regardless of its relationship to strategic intent, is the combination of deliberate and emergent strategy.



Other SP research has focused on the complex relationship between intent and action, documenting the important roles of iterated routines of resource allocation at different organizational levels, and generating an integrative SP framework which is commonly referred to as the Bower-Burgelman model (Bower, 1970; Bower & Gilbert, 2005; Burgelman, 1983, 1985, 1994, 1996). This model distinguishes between organizational actions that are ‘induced’ from intended strategy and those that are not, which are termed ‘autonomous’. The former refers to projects undertaken in response to the strategic intent of top managers, whereas the latter refers to projects that, in challenging and diverging from prevailing ideas, are dissonant with strategic intent (Burgelman, 1983). Such autonomous strategic behavior is a necessary precursor to emergent strategy (Mirabeau & Maguire, 2014). However, just as not all intended strategy becomes realized, not all autonomous action endures to produce the pattern of sustained action that constitutes emergent strategy. Some autonomous strategic behavior fizzles and disappears, in which case the strategy is *ephemeral* (Mirabeau & Maguire, 2014).

In sum, SP research has identified six different but interrelated manifestations of strategy (see Figure 1): intended, deliberate, emergent, realized and unrealized (Mintzberg & Waters, 1985), as well as ephemeral (Mirabeau & Maguire, 2014).

– *Insert Figure 1 about here* –

### **Strategy as practice research**

Claims that SAP research is a subset of SP research (Hutzschenreuter & Kleindienst, 2006) have been strongly disputed (Vaara & Whittington, 2012). Although both are concerned with strategy making, SAP research examines how managers strategize through day-to-day activities (Jarzabkowski, 2005; Whittington, 1996) and emphasizes the situated and interpretive nature of strategizing (Denis et al., 2007). Accordingly, strategy is something that practitioners



‘do’, rather than something that organizations ‘have’ (Hendry et al., 2010). Many SAP researchers are interested in the role of linguistic and communicative practices in strategy making, as a result of which SAP research often adopts a discursive lens (Fenton & Langley, 2011; Laine & Vaara, 2007; Vaara et al., 2010). In doing so, it has further differentiated itself from SP research – strategy is not simply something made by practitioners and organizations; rather, strategy as a dominant discourse also ‘makes’ practitioners by reproducing itself as ‘truth’ and shaping managers’ subjectivities (Hardy & Thomas, 2014; Knights & Morgan, 1991).

SAP research embraces an approach that is explicitly sociological – one that moves beyond methodological individualism (Vaara & Whittington, 2012) and traditional actor-centric views of relations among strategists, firms, and the environment – to consider an ontology of strategy that assumes its embeddedness in a wider societal context from which practices emanate (Ezzamel & Willmott, 2008; Jarzabkowski & Fenton, 2006; Seidl & Whittington, 2014). Prevailing organizational and societal practices, i.e., shared, accepted ways of doing things widely understood as ‘strategy’, enable and constrain strategy making not only through power effects on practitioners’ subjectivities, but also by shaping the material and symbolic artifacts with which they carry out the day-to-day work of strategizing (Whittington et al., 2006).

SAP research can be broadly categorized around the techniques, tools, and methods used in strategy making (practices) by organizational members (practitioners) who engage in lived instances of routine and non-routine strategizing work on a day-to-day basis (praxis) (Vaara & Whittington, 2012). Despite the potential to connect practices, practitioners, and praxis to the dynamics of formation of particular strategy content in an explanatory way, SAP research has tended to focus on explaining other phenomena, such as identity, power, and resistance (e.g., Balogun et al., 2014; Hardy & Thomas, 2014; Mantere & Vaara, 2008). According to this work,

“strategy discourse does not just mirror reality, it creates it” (Suominen & Mantere, 2010: 215), enabling and constraining who people are and what they can become; and with organizational implications insomuch as routinized strategy talk reproduces a frame that delimits possibilities for experimentation in strategy making (Vaara et al., 2004).

In sum, SAP research has significantly broadened the scope of strategy research through its interest in political struggles, strategy as discourse, and resistance (e.g., Erkama & Vaara, 2010). It also brings “to light practices that have largely passed unnoticed, and discovering in them effects that previously were hardly imagined” (Vaara & Whittington, 2012: 298).

### **Methodological challenges**

SP and SAP researchers face considerable methodological challenges if they wish to study all six manifestations of strategy. Reviews of SP research (Hutchenreuter & Kleindienst, 2006) and SAP research (Vaara & Whittington, 2012) indicate that both streams of research tend to focus on intended and realized strategy, which are easier to study than other manifestations. Intended strategy can be identified by drawing on talk (including interviews) and texts (such as strategic plans) about intentions for the future (e.g., Spee & Jarzabkowski, 2011). Both interviews and plans are methodologically convenient artifacts for researchers to access. Realized strategy can be identified by drawing on retrospective interviews about what happened and/or organizational texts such as periodic reports that document previous actions (e.g., Regnér, 2003; Liu & Maitlis, 2014), which are also methodologically convenient artifacts for researchers.

The identification of other strategy manifestations is more complex. Deliberate strategy requires a comparison of actions that have been taken *and* sustained over time with prior discourse about planned actions in order to confirm that the sustained action was intended (e.g., Burgelman & Siegel, 2007). The identification of emergent strategy requires a similar

comparison of discourse about strategic intent from one point in time with subsequent patterns in action in order to establish an absence of correspondence between the two (e.g., Noda & Bower, 1996). In other words, documenting deliberate and emergent strategy requires data about *both* discourse and action. The identification of unrealized and ephemeral strategy involves an even greater amount of methodological complexity owing to their transient nature. To ascertain unrealized strategy, researchers must compare discourse about strategic intent at one point in time with action that was planned but did not endure. Ephemeral strategy requires researchers to identify autonomous strategic behavior that does not endure. In the next section, we explain how our integrated methodology addresses these challenges.

## **SECTION TWO: AN INTEGRATED METHODOLOGY FOR STUDYING STRATEGY**

There are two important rationales for developing our methodology. The first rationale is that both SP and SAP researchers can deepen their understanding by examining multiple manifestations. This is the case even for scholars whose main focus is on a single manifestation, because of the temporal and conceptual relations among the manifestations. For example, intended strategy is a precursor to both deliberate and unrealized strategy: to understand fully what happens to intended strategy requires researchers to establish the existence and nature of both. Similarly, realized strategy is made up of deliberate and emergent strategy. If we are to grasp how realized strategy comes into being, we need to explore whether and how it arises from deliberate action or emerges from unplanned action. Likewise, autonomous strategic behavior is a precursor to both emergent and ephemeral strategy, so documenting and comparing them offers more insight into the survival of autonomous projects. No current method is capable of tracking all six manifestations in a single study. As a result, the methodology we present here is an important aid to SP and SAP researchers.

The second rationale concerns the particular case of transient manifestations of strategy, which have been virtually ignored in the literature because of the methodological challenges they pose. As Mantere (2005: 160) points out: “the issue of thwarted [strategy] champions is largely unexplored.” This is a significant lacuna insofar as knowledge about what hinders or prevents strategic action from enduring is of considerable importance to practitioners and researchers alike; as is learning about whether and how transient strategies have organizational consequences despite their fleeting nature. In addition, insofar as SP and SAP researchers wish to identify and shed light upon neglected and less visible aspects of strategy making, the study of transient manifestations of strategy promises considerable theoretical insights. Our methodology overcomes limitations of existing methods in studying transient manifestations (as we demonstrate in this section), thus providing a basis for significant theoretical development in relation to practices giving rise to these manifestations, as well as their organizational consequences (as we elaborate in Section Three).

Existing methods have significant shortcomings in relation to unrealized and ephemeral strategy. For example, interviewees could be asked to identify projects that ‘fail’ or were short-lived. However, they may not be aware of all fleeting projects since, by their very nature, such projects engage fewer organizational members than those that endure. In particular, middle and top managers (who are often the focus of strategy research) may be completely unaware of autonomous strategic action taken by front line managers if it does not endure. Even if they are aware of fleeting projects, interviewees may not accurately recall all of them, or they may not be forthcoming about them since such projects are often associated with ‘failure’. Also, different interviewees might understand ‘fleeting’ differently and offer up inconsistent lists of projects. Finally, accurately distinguishing autonomous from induced projects requires interviewees to

know the intended strategy at the time of the project's inception, which may have been long before the interview. They may be unable to recall the original intended strategy or may confuse the current intended strategy with the original one. Ethnographic techniques – following projects in 'real time' through participant observation – are also problematic. It is unlikely that the researcher will be aware of or have the time to follow all strategic projects. Further, the ones they follow may not turn out to be fleeting. In sum, existing methods are unlikely to produce a comprehensive documentation of unrealized and ephemeral strategy.

To develop our methodology, we build upon foundational research: Mintzberg's conceptualization of strategy as patterned action and the Bower-Burgelman model of strategy as iterated resource allocation (Bower, 1970; Burgelman, 1983; Noda & Bower, 1996). The methodology comprises three stages. The first stage operationalizes the concept of strategy by documenting it in terms of empirical strategic categories prevailing at a given time, and tracks strategy as discourse to capture intended strategy. The second stage tracks strategy as action in terms of empirical strategic projects and permits the identification of realized strategy by operationalizing patterns over time in a transparent, rigorous way. The third stage involves an analysis of consonance and dissonance between discourse and action to distinguish induced from autonomous projects, thus permitting the identification of deliberate, emergent, unrealized and ephemeral strategy. By carrying out all three stages, researchers can systematically ascertain the six manifestations of strategy, while respecting the richness of their qualitative data (Table 1).

*- Insert Table 1 about here -*

### **Stage 1: Tracking strategy as discourse to ascertain intended strategy**

Tracking strategy as discourse allows researchers to ascertain an organization's intended strategy. Increasingly, strategic management scholars are seeking to "understand strategies as

discursive constructions created in complex ongoing sense making processes...These constructions can thus be seen as stabilizations of specific organizational intentions” (Vaara et al., 2004: 1). With its emphasis on the ideational realm and intentions, this approach to understanding strategy is well suited to exploring strategy as a plan, i.e., intended strategy (Mintzberg, 1978, 1987). In discussing intended strategy, Burgelman (1983: 66) refers to the “concept of strategy”, which represents “the more or less explicit articulation of the firm’s [or other type of organization’s] theory about its past concrete achievement” while providing a basis for “continuity in strategic activity” by inducing “further strategic initiative in line with it.” It is made up of an ensemble of strategic categories that practitioners use to make sense of the organization and its environment (Burgelman, 1983), as well as link the organization’s past, present, and future in a coherent way (Kaplan & Orlikowski, 2013). This first stage of our methodology tracks an organization’s concept of strategy by identifying the categories used by top managers of the focal organization(s) to talk about their firm’s corporate, business, and operational strategies, in each time period under consideration. Tracking all three levels (i.e., corporate, business, and operational) over time, it surfaces a comprehensive set of strategic categories that reflect what managers talk about as they formulate intended strategy.

Tracking strategy as discourse to characterize an organization’s intended strategy involves two steps. In the first step, researchers must determine the unit of *time*  $t$ , i.e., they need to define the temporal coarseness of grain for the study (yielding  $t = 1, 2, 3, \dots T$ , where  $T$  is the overall number of periods in the study). Researchers must also identify and collect a set of top management or organization level texts that, ideally, are produced in a recurring way in each time slice. Examples of such texts include strategic plans, planning documents, annual reports, employee newsletters, and investor communications since these documents are typically

produced cyclically for internal and external audiences. In practice, the availability and accessibility of organizational texts and the periodicity with which they are produced affects researchers' determination of the coarseness of grain for their study.

In the second step, these texts are coded for themes relating to strategy content associated with each of the three strategy levels and for each period of the study. Here, researchers can adopt an inductive approach that allows for strategic categories to emerge from codes anchored in the data as would be expected in grounded theory building (cf. Mirabeau & Maguire, 2014). Alternatively, researchers can adopt a more deductive approach by pre-determining categories from a literature review or by drawing on existing typologies and categorization schemes. As an example, a study choosing to impose strategic categories on the data could potentially track corporate level strategies using categories ( $C^i$ ) from Ansoff's (1965) matrix (i.e., market penetration, market development, product development, and diversification); and business level strategies using categories ( $B^j$ ) from Porter's (1980) generic strategies (i.e. cost leadership, differentiation and niche). Operational (or functional) level strategies could be tracked using categories ( $F^k$ ) from typologies addressing one or more of the components of an organization's value chain, i.e., inbound logistics, operations, marketing and sales, service, infrastructure, human resources management, technology, and procurement (Porter, 1980). For example, operational level strategies for marketing and sales could be tracked using strategic categories related to the four P's of marketing – product, price, place, and promotion (McCarthy, 1960).

Regardless of whether categories emerge from inductive coding or are deduced from theory, this analysis yields a set of strategic categories to be tracked over time:  $C^i$ , with  $i = 1, 2, \dots I$ , where  $I$  represents the total number of strategic categories related to corporate strategy;  $B^j$ , with  $j = 1, 2, \dots J$ , where  $J$  represents the total number of strategic categories related to business



strategy; and  $F^k$ , with  $k = 1, 2, \dots K$ , where  $K$  represents the total number of strategic categories related to operational strategy. Coding of the data allows researchers to capture a cross-sectional view of the prevailing concept of strategy by representing the  $n = 1$  to  $N$  strategic categories at a given time  $t$ , where  $N = I + J + K$ ; as well as a longitudinal view capturing the presence or absence of a single strategic category  $n$  in the prevailing concept of strategy for all times  $t = 1$  to  $T$ , where  $T$  is the number of time periods in the study. It also allows researchers to construct a longitudinal view of the overall concept of strategy (Burgelman, 1983, 2011), represented by a two-dimensional array of  $T$  columns (the number of time periods), by  $N$  rows (the number of distinct strategic categories covering all three hierarchical levels of strategy). See Figure 2.

*- Insert Figure 2 about here -*

This stage of the methodology accomplishes two important things. First, it formalizes a way of identifying the concept of strategy of an organization at any given time during the period of study, providing a systematic way of tracking intended strategy. Second, it captures all three hierarchical levels of strategy, allowing researchers to view strategy formation across different layers in order to understand top-down and bottom-up dynamics of strategy formation.<sup>1</sup>

## **Stage 2: Tracking strategy as action to ascertain realized strategy**

Tracking strategy as action or activities to document patterns over time (Mintzberg, 1978) allows researchers to ascertain realized strategy. Porter (1996: 62) argues that activities are the basic unit of competitive advantage, and views “strategic positioning as performing different activities from rivals or performing similar activities in different ways.” The distinctiveness of an

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<sup>1</sup> In its generalized form, this stage of our methodology does not prescribe whether the contents of the array are qualitative or quantitative or, in the case of the latter, whether the quantities tracked in the cells of the array are treated as discrete or continuous variables, thus leaving maximum flexibility in its implementation. It is possible, then, that our methodology may have benefits for quantitative, as well as qualitative, research although this is not something we have been able to explore within the confines of this paper.

organization's strategy thus comes from choosing a unique combination of activities. This definition of strategy is appealing to researchers who are looking to operationalize the concept at a micro-level of analysis, as it implies that tracking strategy involves examining the introduction, maintenance, evolution, and disappearance of particular activities in an organization.

Porter's (1996) approach highlights that strategy is about combining activities, which suggests a link between his view of strategy as a portfolio of activities and Mintzberg's (1978) view of strategy as a pattern in action. The main difference between the two views rests with the relationship to time as a variable. Porter's approach focuses on the mix of activities at a given time, while Mintzberg's approach views strategy as a pattern, which unfolds over time. We see fertile common ground between Porter and Mintzberg's definitions: together they suggest viewing – and tracking – strategy as a portfolio of activities evolving over time.

In some cases, tracking activities may prove difficult. Indeed, activities may be singular acts by individuals, which may require such finely-grained data collection as to be impractical. We, therefore, suggest that researchers operationalize activities evolving over time by tracking the implementation of *strategic projects* i.e., bundles of purposeful activities with stated objectives. Tracking strategic projects in this way is consistent with the literature on emergent strategy (Mintzberg, 1978; Mintzberg & McHugh, 1985) and resource allocation (Burgelman, 1985; Noda & Bower, 1996), as well as the SAP literature (Kaplan, 2011; Sillince et al., 2012).

Tracking strategy as action involves two steps. The first step concerns the identification of *strategic projects* in place at a given time  $t$ . At a conceptual level, a strategic project can be understood as purposeful activity undertaken towards stated objectives and spanning one or more strategy levels (i.e., corporate, business, operational). In terms of data, what is required are texts from lower levels of the organization that contain traces of projects ongoing or already

accomplished, such as operators' reports, output and activity records, or performance summaries.

The second step involves tracking projects over time by identifying the time period of the project's inception and assessing whether the project *endures* over a number of consecutive periods. This way, realized strategy is determined by projects resulting in patterned action over time (Mintzberg, 1978; 1987). It is important to note that the operationalization of whether actions endure or whether they are fleeting is likely to vary across studies. One way to assess the appropriateness of a particular granularity in measuring time is to consider the cycle for new product development. For example, studies of telecommunications companies, which engage in fast development cycles and regularly experience new product generations (Burgelman, 1994; Noda & Bower, 1996), should operationalize 'enduring' using a small number of finely-grained time slices. A recent study by Mirabeau and Maguire (2014) considered projects to be enduring when there was clear evidence of project activity in four or more consecutive six-month time periods. Studies of companies in industries where the pace of change is slower might operationalize 'enduring' using either larger time slices or a larger number of small time slices. In this way, researchers should decide upon a *temporal threshold* for declaring a project to be enduring that is in line with the organization being studied, and operationalize it accordingly in terms of the appropriate granularity and number of time slices.

Formalizing this analysis, from step one we obtain a set of  $r$  projects:  $P_1, P_2, \dots, P_R$ , where  $R$  represents the total number of projects. With step two we obtain two time identifiers for each project. The first time stamp –  $t_i$  – denotes the time period for the project's inception, while the second date –  $t_e$  – reports on the end of the project, which occurs not when activities are embedded into routine organizational functioning but, rather, when activities are no longer performed, i.e., when they are halted and the project's objective is no longer sought. For

example, a project of entering a new market with an existing product (i.e., a corporate strategy) would be considered to endure until the point when the firm withdraws the product from the market. This yields the set of projects:  $P_{r=1toR} = \{P_1(t_{i1}, t_{e1}), P_2(t_{i2}, t_{e2}), \dots P_R(t_{iR}, t_{eR})\}$ .

This stage of the methodology provides a systematic way of tracking realized strategy (Mintzberg & Waters, 1985). It highlights an approach for operationalizing and tracking activities via strategic projects, which we see as common methodological ground for SP researchers (e.g., Burgelman, 1983; Floyd & Wooldridge, 1992; Schilling & Hill, 1998) and SAP researchers (e.g., Kaplan, 2011; Kaplan & Orlikowski, 2013; Sillince et al., 2012). In addition, it encourages scholars to be transparent in their methods as to what counts as a ‘pattern over time’ (Mintzberg, 1978) by tracking both project inception and end, and by clearly stating how they distinguish between enduring and fleeting projects. This emphasis is thus a subtle yet important mechanism for enhancing comparability across studies.

### **Stage 3: Identifying consonance and dissonance**

The third stage of our methodology captures the alignment – or lack thereof – between strategy as discourse about intent and what is actually accomplished via strategic action. To do so, the analysis discerns the strategic consonance or dissonance (Burgelman, 1983; Burgelman & Grove, 1996) of projects and ascertains whether or not the projects endure to establish a pattern over time (Mintzberg, 1978). It features four steps that build on the earlier stages of the methodology i.e., it assumes that the set of all strategic categories for all time periods, as well the set of all projects, along with their points of inception and duration, have been identified.

Step one consists of identifying the subset of strategic categories that characterizes the prevailing concept of strategy during the particular time period of inception of a given project, from stages one and two above. Step two consists of assessing how the project relates to each of

these strategic categories, as: (1) *consonant*, where activities undertaken for the project are interpreted as being consistent with the categories; (2) *dissonant*, where activities undertaken for the project are interpreted as being inconsistent with the categories; or (3) *unrelated*, where activities undertaken for the project are neither clearly consistent nor inconsistent with the categories. Evaluating the consonance or dissonance of a project with prevailing strategic categories involves interpretation and, therefore, transparency at this step is vital in establishing a rigorous and credible study. Techniques such as using multiple coders and confirming inter-coder reliability, having informants verify coders' interpretations, and triangulating conclusions of consonance or dissonance with interview data can help to improve reliability.

Step three consists of classifying the project as *induced* when the project and the concept of strategy prevailing at its inception are deemed consonant or, conversely, *autonomous* when they are not. Induced strategic behavior is activity that is consistent with intended strategy, while autonomous strategic behavior is at odds with it (cf. Burgelman, 1983). Transparency is also important at this step. For example, researchers might declare a project to be autonomous when it is not deemed consonant with any of the strategic categories prevailing at its inception (i.e., in the absence of consonance); or, they may be more conservative and only identify a project as autonomous when it is deemed dissonant with one or more categories (i.e. in the presence of dissonance). Neither approach is, a priori, superior to the other since their appropriateness depends upon the study's objective. By being explicit about their approach, however, researchers can not only ensure transparency, but also document the degree and nature of an autonomous project's dissonance by counting and noting the specific categories with which it is dissonant.

Step four consists of characterizing deliberate and unrealized strategy in terms of induced projects, and emergent and ephemeral strategy in terms of autonomous projects. Induced projects

that endure beyond the temporal threshold established in the second stage constitute deliberate strategy, while induced projects that do not endure constitute unrealized strategy. Similarly, autonomous projects that endure beyond the temporal threshold established in the second stage constitute emergent strategy, while autonomous projects that do not endure beyond this threshold constitute ephemeral strategy.

In sum, SP and SAP researchers can systematically and robustly ascertain all six manifestations of strategy in a single study and characterize them in terms of strategic projects by using our integrated methodology. Figure 3 provides an illustration of our methodology applied to a situation where there were nine strategic projects – six were induced (P<sub>1</sub>, P<sub>2</sub>, P<sub>4</sub>, P<sub>7</sub>, P<sub>8</sub>, P<sub>9</sub>) and three were autonomous (P<sub>3</sub>, P<sub>5</sub>, P<sub>6</sub>). Four of the induced projects endured sufficiently to be considered realized, becoming deliberate strategy (P<sub>1</sub>, P<sub>2</sub>, P<sub>7</sub>, P<sub>9</sub>), while two autonomous projects were also realized, becoming emergent strategy (P<sub>5</sub>, P<sub>6</sub>). Three projects failed to endure past the temporal threshold of which two were classified as unrealized strategy (P<sub>4</sub>, P<sub>8</sub>) because they were induced, and one as ephemeral (P<sub>3</sub>) because it was an autonomous project.

*- Insert Figure 3 about here -*

In addition to documenting all manifestations of strategy, our methodology overcomes the shortcomings of other qualitative methods in systematically and comprehensively documenting unrealized and ephemeral strategy. By drawing from textual data produced at multiple levels in the organization, which can also be triangulated with interview data, it is more likely to generate a comprehensive inventory of strategic projects than other methods, ensuring that fleeting projects are identified. The methodology also prompts researchers to establish and operationalize a temporal threshold appropriate to their study in a rigorous way and to use it consistently throughout their data analysis to designate a project as fleeting or not. In

operationalizing the concept of strategy by coding textual data to identify strategic categories and how they change over time, and in documenting the date of the project's inception from textual data, it helps researchers to compare the project with the intended strategy at the time of its inception accurately. This allows researchers to establish the consonance or dissonance of a given strategic project with strategic intent and, in turn, to distinguish accurately between induced and autonomous projects. In the next section, we illustrate the utility of applying our methodology to the two transient manifestations, i.e. unrealized and ephemeral strategy.

### **SECTION THREE: STUDYING TRANSIENT MANIFESTATIONS OF STRATEGY**

Our methodology is particularly useful for studying the transient manifestations – i.e., unrealized and ephemeral strategy – in a way that bridges SP and SAP research. We illustrate its utility in this section by combining it with the evolutionary or ‘Variation-Selection-Retention’ (V-S-R) strategy making approach (Barnett & Burgelman, 1996; Burgelman, 1996). The link between the V-S-R approach and SP research is well established (e.g., Henderson & Stern, 2004), having first been made by Burgelman (1983) and further developed with his work on the intraorganizational ecology of strategy making (Burgelman, 1991). The link to SAP research is, however, not so well established, despite the benefit to be derived from using the V-S-R framework to explore how strategy practices relate to different manifestations of strategy. Specifically, strategic change requires *variation* in content, which can originate in the realm of sanctioned organizational discourse as planned top-down change, or in the realm of action as a novel but unsanctioned bottom-up project. In addition, the variation must be *selected* for resourcing by practitioners at multiple organizational levels and *retained* through the alteration of strategic and structural contexts in ways consistent with the change. If variations are not selected and/or retained, intended strategic change becomes unrealized, and novel autonomous



projects become ephemeral. Below, we show how the combination of our methodology and the V-S-R framework can be used to identify practices that give rise to unrealized and ephemeral strategy, as well as their organizational consequences.

### **Studying practices giving rise to unrealized strategy**

Intended strategy is a precursor to unrealized strategy and deliberate strategy, which raises the question: which features of strategy making influence whether strategic intent has a higher likelihood of being frustrated – and becoming unrealized strategy – rather than being implemented to become part of the deliberate strategy component of realized strategy? This is of particular interest to researchers and practising managers who, naturally, are interested in knowing more about why ‘the best laid plans’ sometimes fail to materialize. Viewed in terms of the V-S-R framework, the production of intended strategy comprising change represents a variation from prevailing strategic categories which, if selected and retained, results in the intended strategic change becoming realized. In the case of unrealized strategy, projects induced from novel strategic categories in the realm of discourse fail to take hold to become realized strategy in the realm of action. Thus the variation is *not* selected and retained. Restated in terms of the V-S-R framework, the key question becomes: how do particular strategy practices contribute to the non-selection or non-retention of top-down change projects induced from variation in strategic intent?

Our methodology is well-suited to addressing this question since it documents – at the level of finely-grained categories – the variation in content that constitutes a change in intended strategy, as well as the subsequent non-selection and non-retention of projects induced by the variation i.e., unrealized strategy. By examining the relationship between intended and unrealized strategy, our methodology can be used to identify and investigate the role of specific

strategy practices in producing unrealized strategy.

The existing SAP literature provides an indication of specific practices that could be studied in this way. For example, the wide involvement of practitioners across multiple organizational levels in strategic planning and their inclusion in vertical and lateral dialogue have been found to generate strategy content that is more likely to be successfully implemented (Floyd & Wooldridge, 2000; Laine & Vaara, 2007; Mintzberg, 1994). Intended variations are more likely to be realized when practices generate feelings of inclusion and empowerment (Westley, 1990; Wooldridge & Floyd, 1990), managerial commitment (Dooley et al., 2000), and motivation (Burgelman, 2016). It therefore seems likely that practices characterized by *narrow, limited participation and dialogue* are more likely to generate unrealized strategy insofar as lower and middle managers are disinclined to select and retain strategic content forced on them.

*Open-ended, flexible planning* aimed at generating multiple, possible scenarios is also likely to lead to unrealized strategy. SAP research has problematized the widespread assumption that strategic planning is always a rational, top-down exercise aimed at generating plans that are expected to be fully and completely implemented. Rather, planning can be viewed as an opportunity for creativity and the generation of multiple possible intended futures or scenarios (Giraudeau, 2008). Insofar as the introduction of novel categories serves as experimentation, with full expectation that not all aspects of a plan will be acted upon (Giraudeau, 2008) and managers will adapt to new realities in the realm of action (Jarzabkowski, 2008) by amending plans (Spee & Jarzabkowski, 2011), more intended variations will be generated but they will be less likely to be selected and retained, resulting in unrealized strategy.

How strategy is ‘consumed’ may also influence whether it is more likely to be successfully implemented. Suominen and Mantere (2010) show that managers may consume

strategy instrumentally, by translating intended strategy content into a series of sub-strategies aimed at ensuring that sub-units align themselves with the intended strategy, thereby increasing the chances that intended variations will be selected and retained. Conversely, the *playful consumption of intended strategy* appears more likely to result in unrealized strategy. ‘Serious play’ (see Statler, Heracleous & Jacobs, 2011) can complement more traditional processes of strategy development (e.g., Roos et al., 2004) and, therefore, it is important not to equate play with resistance. That said, in some situations a playful stance can lead individuals to become critical of intended strategy through ridicule, parody or irony: “the playful tactic embodies a critique and resistance toward strategy and its methods, which can be read as a sign of cynicism from the managers ... [It] resists and subverts strategy implicitly and quietly on its own terms” (Suominen & Mantere, 2010: 234). If playful practices do take the form of resistance, they can derail a strategic initiative or result in outcomes far removed from those intended (Balogun et al., 2011; Laine & Vaara, 2007; Mantere & Vaara, 2008).

Our methodology also documents the selection and retention of projects that constitute realized strategy and distinguishes between those induced from intended strategy (i.e., the deliberate component of realized strategy) and those originating as autonomous, bottom-up projects (i.e., the emergent component of realized strategy). Induced and autonomous projects typically compete for limited resources. Consequently, practices for allocating resources to one project over another can play an important role in facilitating unrealized strategy. *Resource allocation practices that allow deviations from plans* appear more likely to result in strategy being unrealized. For example, middle managers at Intel championed an emergent strategy of microprocessors over the intended DRAM strategy (Burgelman, 2002a, 2002b). They neutralized Intel’s ‘Commitment to DRAM’ category by constructing another category – ‘Maximizing

Margins' – such that resources flowed to autonomous projects for microprocessors, which were the higher margin products, rather than induced projects for DRAM. This non-selection of DRAM projects meant that, over time, this intended strategy became an unrealized strategy.

### ***Research agenda***

The SAP literature provide us with a preliminary set of practices that appear likely to be associated with unrealized strategy. Of particular interest here is SAP research drawing on discourse analysis to highlight that the discursive dynamics of both producing and consuming intended strategy content can shape action and resource allocation (e.g. Laine & Vaara, 2007; Suominen & Mantere, 2010; Mirabeau & Maguire, 2014). However, more research is needed to ascertain whether and how specific practices account for unrealized strategy. Given the practical and theoretical importance of understanding why strategic plans are not implemented in an enduring way, our methodology can serve as the basis for research designed to identify and investigate the practices that produce unrealized strategy. By combining our methodology for tracking strategy content with discourse analysis as well other methods (e.g. interviews, participant observation, ethnographies) that are commonly used in SP and SAP research to study how, why and by whom strategy content is made, researchers will be able to identify and explore the mechanisms through which specific content goes unrealized.

As a first step, our methodology should be used to document intended strategy (since it is a precursor to unrealized strategy) in terms of strategic categories; and to ascertain strategic projects induced from it by verifying their consonance with these categories. It is then important to establish a temporal threshold to operationalize and distinguish induced projects that endure (which represent deliberate strategy) from induced projects that are fleeting (which represent unrealized strategy). As discussed above, the appropriate period of time to use will vary

according to the industry under consideration. Having identified a particular induced but fleeting project, researchers then, in a second step, should collect and analyze data about the specific practices associated with it over its short life cycle – a step we refer to as constructing a project’s ‘practice history’. This history might document the specific practices used to produce the intended strategy, communicate it to middle and front line managers, consume and translate it into the induced project, champion the project, etc., depending upon the researcher’s focus.

Subsequent analysis could be carried out by comparing the practice histories of multiple induced but fleeting projects to ascertain commonalities. If certain practices feature in multiple short histories, they are likely to be implicated in the non-selection and non-retention of these projects and, hence, to account for the production of unrealized strategy. To explore further, researchers could then construct practice histories for induced projects that endured to become deliberate strategy, and compare them with those for the induced but fleeting projects that make up unrealized strategy, to ascertain differences. It is important to note that, since the interest is on unrealized strategy, only the practice history from the *early* days of enduring projects is relevant, i.e., practices enacted prior to the temporal threshold used to declare the project an enduring one. If practices associated with the histories of fleeting projects making up unrealized strategy differ from those associated with the early histories of enduring projects making up deliberate strategy, then the case for concluding that the former lead to unrealized strategy is strengthened.

Another angle of investigation involves using practice histories to analyze interactions among projects by leveraging our methodology’s ability to highlight relations among different manifestations of strategy. For example, if bottom-up autonomous projects are resourced at the expense of top-down induced projects, the former are more likely to endure to become emergent strategy, while the latter – starved of resources – become unrealized strategy. Our methodology

allows researchers to identify autonomous projects that endure, for which practice histories could be constructed and compared with those of induced but fleeting projects, to reveal whether and how resource allocation practices shape the divergent fates of the induced and autonomous projects. Another possibility is that specific practices of manipulating strategic context and altering structural context to help autonomous projects to become emergent strategy may have unintended consequences in terms of rendering these contexts less hospitable to induced projects despite the latter's consonance with intended strategy, again resulting in unrealized strategy. In documenting projects associated with each manifestation of strategy, our methodology helps researchers to identify appropriate comparison projects whose practice histories will be most revelatory for understanding unrealized strategy.

### **Studying practices giving rise to ephemeral strategy**

Ephemeral strategy arises when autonomous strategic behavior i.e., unsanctioned projects at odds with prevailing strategic categories, fail to take hold and endure. Autonomous strategic behavior is a precursor to both ephemeral and emergent strategy, which raises the following question: what features of strategy making influence whether and how projects at odds with intended strategy are more likely to be abandoned – and become ephemeral strategy – rather than enduring to become part of the emergent strategy component of realized strategy? This is of particular interest to researchers and practising managers, especially those championing bottom-up change who, naturally, are interested in knowing more about what they can do to influence their organization's strategy. Viewed in terms of the V-S-R framework, ephemeral strategy arises when the variation stemming from an autonomous project is *not* selected and retained. In the event that such variation is selected and retained, the result is emergent strategy. As we show here, if we use our methodology to examine the relationships among the different manifestations

of strategy, we are in a position to identify and investigate the practices that are likely to give rise to ephemeral strategy. Restated in terms of the V-S-R framework, the key question becomes: how do particular strategy practices contribute to the non-selection or non-retention of bottom-up change projects arising from variation in autonomous strategic behavior?

Our methodology is well-suited to addressing this question since it documents – at the level of finely-grained categories – the variation in content that constitutes novel autonomous strategic behaviour as well as the nature of its dissonance with intended strategy. Such autonomous variations may arise from adaptive responses to intended strategy, such as inductive practices that encourage exploration, experiments, and trial and error to generate new strategic knowledge from the organizational periphery (Regnér, 2003), or from practices to resist intended strategy that serve as the basis for “autonomous strategic development work” unsupported by corporate management discourse (Laine & Vaara, 2007: 47).

Having established the existence of autonomous projects as well as identifying how they are dissonant with intended strategy, researchers can use our methodology to document whether these variations are subsequently selected and/or retained, thereby providing a basis for investigating the role of specific strategy practices in producing ephemeral strategy. Again, the existing SAP literature provides an indication of specific practices that could be studied in this way. For example, autonomous projects may have a higher likelihood of being abandoned to become ephemeral strategy if their content is *directly contradictory to intended strategy rather than merely tangential to it*. Tangential content emanating from autonomous projects is easier to select and retain because its dissonance with intended strategy can be eliminated by ‘stretching’ existing strategic categories (i.e., reconstructing them in ways that facilitate the eventual interpretation of autonomous projects as consonant with them) or by adding new ones. If this



occurs, emergent strategy will result (cf. Mirabeau & Maguire, 2014). In contrast, contradictory content is too dissonant with intended strategy to be accommodated by manipulating strategic context: existing categories can only be stretched so far, while adding new but contradictory categories undermines the intended strategy. As a result, variation in bottom-up action that is directly contradictory, rather than merely tangential, to intended strategy is unlikely to be selected and retained and, therefore, is more likely to become ephemeral.

Autonomous projects whose variation is born of *resistant practices* seem more likely to become ephemeral than those whose variation derives from inductive, adaptive practices. In seeking to counter intended strategy, resistant practices are more likely to generate variation that is directly contradictory to it, which makes the selection and retention of these autonomous projects less likely as noted above. Non-selection and non-retention of such projects are not inevitable, however. Some researchers (Ford, Ford & D'Amelio, 2008; Piderit, 2000) argue that resistance can be incorporated into and be used to improve upon top-down change initiatives, particularly when intended strategy is characterized by high ambiguity (e.g., Eisenberg, 1984). Accordingly, researchers need to examine resistance carefully to ascertain whether it is 'oppositional' or 'facilitative' (Thomas, Sargent & Hardy, 2011). The former appears more likely to result in ephemeral strategy, whereas the latter does not.

Our methodology also documents the selection and retention of projects that constitute realized strategy, distinguishing between deliberate and emergent components. In this way, it can be used to identify and investigate further practices that are likely to lead to ephemeral strategy. Emergent strategy arises when autonomous projects are selected and retained, which means that they have been successful in securing resources. This outcome is more likely when resource allocation practices allow for flexibility so that unplanned projects can be funded. Conversely,

*resource allocation practices that discourage deviations from plans* may increase the chances that bottom-up variations become ephemeral strategy. Such practices make it difficult for managers to divert funding from sanctioned, induced projects to unsanctioned autonomous ones, leading to the latter's non-selection and non-retention and, hence, ephemeral strategy.

More generally, *recursive rather than adaptive practices* are likely to result in ephemeral strategy. These practices encourage “a unified conception of strategy through the dissemination of information i.e., objective knowledge, through pre-defined methods of giving feedback and through the operationalization of strategy into explicit targets” (Mantere, 2005: 169). Adaptive practices, in contrast, stress “interactive impromptu discussions concerning strategy, continuous negotiation of responsibility”, and control via social networks rather than formal resource allocation and performance evaluation (p. 175). Recursive practices make it more difficult for champions of a bottom-up variation to mobilize resources for their autonomous projects, to access the relevant decision arenas to manipulate strategic context, and to alter structural context. Consequently, their autonomous projects are less likely to be selected and retained – becoming ephemeral rather than taking hold as emergent strategy (Mirabeau & Maguire, 2014).

### ***Research agenda***

SAP research provides a preliminary set of practices that appear likely to be associated with ephemeral strategy. Of particular interest here is SAP research drawing on narrative analysis of interviews as well as discourse analysis to highlight that particular practices differentially enable and constrain both the launching and championing of autonomous projects (e.g. Mantere, 2005; Laine & Vaara, 2007; Mirabeau & Maguire, 2014). However, more research is needed to ascertain whether and how specific practices account for ephemeral strategy. Given the practical and theoretical importance of understanding why autonomous projects are not

implemented in an enduring way to become emergent strategy, our methodology can serve as the basis for research designed to identify and investigate the practices that produce ephemeral strategy. By combining our methodology for tracking strategy content with narrative and discourse analysis as well other methods (e.g. interviews, participant observation, ethnographies) that are commonly used in SP and SAP research to study how, why and by whom strategy content is made, researchers will be able to identify and explore the mechanisms through which specific content becomes ephemeral.

As a first step, our methodology should be used to document the existence of autonomous strategic behaviour (since it is a precursor to ephemeral strategy). Our methodology does so by documenting intended strategy in terms of strategic categories and then identifying strategic projects that are dissonant with these categories, as well as capturing the nature of their dissonance. It is then important to establish an appropriate temporal threshold to operationalize and distinguish autonomous projects that endure, which represent emergent strategy, from autonomous projects that are fleeting, which represent ephemeral strategy. As previously mentioned, the relevant time period is expected to vary according to the industry under consideration. Having identified a given autonomous project that was fleeting, researchers then, in a second step, should collect and analyze data about the specific practices associated with it over its short life cycle by constructing the project's practice history. This history might document the specific practices used to generate the autonomous strategic behavior manifested in the project, champion the project, mobilize resources, manipulate strategic context and alter structural context to accommodate the project, etc., depending upon the researcher's focus.

Subsequent analysis could then be carried out by comparing the practice histories of multiple fleeting autonomous projects to ascertain commonalities. If certain practices feature in

multiple short histories, they are likely to be implicated in the non-selection and non-retention of these projects and, hence, to account for the production of ephemeral strategy. To explore further, researchers could then construct practice histories for autonomous projects that endured to become emergent strategy, and compare them with those for the fleeting autonomous projects to ascertain differences. It is important to note that, since the interest is on ephemeral strategy, only the practice history from the *early* days of the enduring projects is relevant i.e., practices enacted prior to the temporal threshold used to declare the project an enduring one. If practices associated with the histories of fleeting projects making up ephemeral strategy are different from those associated with the early histories of enduring projects making up emergent strategy, then the case for concluding that the former lead to ephemeral strategy is strengthened.

Another angle of investigation involves analyzing practice histories to examine interactions among projects by leveraging our methodology's ability to highlight relations among different manifestations of strategy. As mentioned above, bottom-up autonomous projects and top-down induced projects may compete with each other for resources. If the latter are resourced and endure to become deliberate strategy, the former may be starved of resources and become ephemeral strategy. Our methodology allows researchers to identify induced projects that endure, for which practice histories can be constructed and compared with those of fleeting autonomous projects to reveal whether and how resource allocation practices shape the divergent fates of the induced and autonomous projects. In identifying projects associated with each manifestation of strategy, our methodology helps researchers to identify appropriate comparison projects whose practice histories will be most revelatory for understanding ephemeral strategy.

### **Studying consequences of transient manifestations of strategy**

While it might be intuitive to conclude that unrealized and ephemeral strategy are

inconsequential because they are transient, these strategies can have longer-term effects. The frustration of prior strategic intent may shape subsequent strategic intent, while the abandonment of prior autonomous projects may influence the generation of subsequent ones. Insofar as researchers and practitioners wish to learn from and leverage the past, these consequences are important. In terms of the V-S-R framework, the key questions are the following. What are the consequences of the non-selection and/or non-retention of variation associated with top-down change projects on subsequent strategic intent? What are the consequences of the non-selection and/or non-retention of variation associated with bottom-up change projects on subsequent autonomous strategic behavior? Our methodology is well-suited to addressing these questions. Having documented relationships among different manifestations of strategy *during* a given time period as detailed above, it can then be applied to *succeeding* time periods to document – at the level of finely-grained categories – the relationship of unrealized strategy to subsequent intended strategy, as well as the relationship of ephemeral strategy to subsequent autonomous strategic behavior. In this way, we are in a position to identify and investigate the consequences of transient manifestations of strategy for subsequent strategy making.

Research in this area is sparse, but the concept of *residuals* of transient strategy content could be explored using our methodology. A study of strategic reversal found that an organization's "sensemaking history" can contain "residuals" of prior strategy content "in the minds of individual employees" and this history influences employees' interpretation and acceptance of subsequent strategy content (Mantere et al., 2012: 173). In promoting the intended merger of an independent service organization with its parent, practitioners engaged in both sensebreaking to delegitimize the status quo and sensegiving to rationalize and legitimate the change. The planned merger was then aborted and the change projects induced from it went

unrealized. However, the earlier sensebreaking and sensegiving could not be undone – the organization could not return to its original state prior to the intended, but unrealized, strategic change because the categories associated with strategic continuity had been discredited. Attempts to resuscitate them created anxiety and mistrust towards top managers who “had undermined their credibility as strategists and communicators” (Mantere et al., 2012: 188). This study highlights how practices of sensebreaking and sensegiving can serve as a mechanism whereby the content of an intended strategy that is unrealized in a given time period can, nonetheless, influence subsequent top-down strategy making.

Ephemeral strategy may also leave residuals that shape subsequent bottom-up strategy making. For example, in their typology of organizational actors who block change initiatives, Armbruster et al. (2013: 484) identify “historians” who sabotage change projects with arguments of the following form: “We tried that already and it did not work”. In other words, in local contexts, failed efforts to mobilize resources, manipulate strategic context and alter structural context do not go unnoticed and, hence, can leave residuals despite their transient nature. In this way, ephemeral strategy in one time-period may shape the autonomous strategic behavior in subsequent time periods by inhibiting the recycling of specific content.

### ***Research agenda***

The SAP literature provides us with a preliminary idea of how transient manifestations of strategy, despite their fleeting nature, may affect subsequent strategy making through residuals. Of particular interest here is SAP research on strategy as narrative and rhetorical histories which highlight that events in the past can be made to be consequential because of how they are interpreted (e.g., Fenton & Langley, 2011; Suddaby et al., 2010), even if they are fleeting (Mantere et al., 2012). However, more research is needed to explore residuals or ascertain

whether transient manifestations of strategy have other consequences. Given the practical and theoretical importance of understanding how the past – or, more importantly, its interpretation and construction as ‘history’ (Suddaby et al., 2010) – shapes the future in strategy making, our methodology can serve as the basis for such research. By combining our methodology for tracking strategy content with the narrative and rhetorical methods used by SAP scholars to explore how histories of strategy making shape subsequent strategy making, as well as with other methods (e.g. interviews, participant observation, ethnographies and discourse analysis) used to study how, why and by whom strategy content is made, researchers will be able to explore how particular processes and practices shape the consequences of transient manifestations of strategy.

As a first step, our methodology should be used to document instances of unrealized and ephemeral strategy in a given period, and to characterize them in terms of fleeting projects for which practice histories could be constructed, as described above. Longitudinal studies of strategy making following this period could then be undertaken to ascertain whether and how the fleeting projects making up unrealized and ephemeral strategy shape the subsequent production of intended strategy and autonomous strategic behavior respectively. Our methodology would then be re-applied to document the content of intended strategy following an instance of unrealized strategy and/or the content of autonomous strategic behavior following an instance of ephemeral strategy. In this way, effects of transient manifestations of strategy and how they come about can be established and theorized.

## **CONCLUSION**

This paper explores the intersection of SP and SAP research by focusing on the focal phenomenon they share – strategy – which is a complex, multifaceted concept carrying multiple meanings that manifests itself in multiple ways. One way to bridge SP and SAP scholarship, we



argue, is through analyses of processes and practices as they relate to strategy content since both streams of research make important contributions to understanding the particular strategies that get made in organizations, how, and by whom. Accordingly, both traditions can benefit from documenting different manifestations when studying the making of strategy. To deal with the methodological challenges facing researchers in studying the full range of strategy manifestations, we have developed a novel, systematic and integrated methodology that is unique in its capacity to track specific empirical strategy content and map it to all six manifestations in a single study. In doing so, we address the concern of Ketchen and colleagues (2008: 654) that “although the execution and implementation of strategy are important issues to organizations and theorists alike, we appear to lack methods that fully capture these processes”. Further, in making tight connections to the six manifestations, and in highlighting the temporal and conceptual relations among them, our methodology overcomes “the weak interconnection between research streams focused on theory development and testing and those focused on methodological advances” (Venkatraman, 2008: 793). Finally, in being systematic and transparent, the methodology can help researchers to ensure construct validity, which “refers to the extent to which a study investigates what it claims” and which is important for ensuring rigorous qualitative case-study research (Gibbert & Ruigrok, 2010: 712).

Our methodology is particularly well suited for investigating transient manifestations of strategy, which pose significant methodological challenges and have been under-theorized to date. We illustrate how researchers can overcome the limitations of existing methods in exploring transient manifestations by combining our methodology with the evolutionary perspective and the literature on strategy practices. In this way, we make a conceptual contribution by theorizing practices that give rise to transient top-down and bottom-up

variations, as well as the consequences of their non-selection and non-retention for subsequent strategy making. We lay out three research agendas using our methodology to broaden our understanding of transient manifestations, setting the stage for future empirical research.

Studies of unrealized and ephemeral strategy have much to offer scholars, as well as practitioners. A better understanding of practices giving rise to so-called ‘failed’ strategy making will provide insight into how to ensure the success of both top-down and bottom-up strategy making. Perhaps less obvious, but equally important, is challenging the idea that these transient manifestations inherently constitute failure. For example, Noda and Bower’s (1996) case study of an ephemeral strategy in a telecommunications company showed its positive consequences for subsequent strategy making in galvanizing managers to pursue international wireless licences and broadband/multimedia opportunities. Ephemeral strategy may also be viewed positively as the price to pay for experimentation. Dyer and Gross (2001) suggest as much in their discussion of Dow Corning, many of whose forays into areas outside its intended strategy apparently failed, but nonetheless sustained other breakthroughs. In other words, managers may cultivate a stock of autonomous projects in full knowledge that some will become ephemeral in order to ensure that an adequate quantity and diversity of variations are available for selection. Future research should explore in more depth the consequences of non-selection and non-retention of both top-down and bottom-up variations, which, a priori, are neither negative nor positive.

Our integrated methodology therefore adds considerable value for researchers wishing to conduct comprehensive, systematic research on multiple manifestations of strategy and/or focus on one or both of the transient manifestations. It also has potential for researchers wishing to focus on other individual manifestations of strategy because, while we acknowledge that executing and integrating the three stages of our methodology may be cumbersome and not

suitable for all studies, the methodology is flexible enough to deal with situations where only one stage is required. Researchers only interested in intended strategy can document it comprehensively using the first stage, while those only interested in realized strategy can document it comprehensively using the second, although we still suggest they may derive more insight from relating the manifestation in which they are interested to other ones, which requires all three stages of our methodology. It is, however, important to underline that the methodology, in documenting *what* strategy content gets made, is complementary to – and not a substitute for – existing methods used by SP and SAP researchers to explore questions of *how*, *why* and *by whom* this content is made. Interviews, participant observation, ethnographies, research diaries, discourse analysis, and so forth remain invaluable methods for studying strategy processes and practices.

Our methodology could also make an important contribution to researchers interested in connecting other strategy constructs to strategy content over time. For example, strategy research has explored how strategists' beliefs and cognitions shape the evolution of firm capabilities and resources, which have been tracked over time using archival and interview data (e.g. Tripsas & Gavetti, 2000; Danneels, 2010). By combining our methodology to document strategy content over time with traditional methods that document the evolution of beliefs, cognitions, capabilities, and/or resources, researchers could explore whether and how patterns of continuity or change in one or more of these constructs relate to the evolution of strategy content over time. Thus, our methodology and existing methods complement each other in helping strategy researchers to connect strategy processes and practices, as well as other strategy constructs, to specific strategy content in empirical studies.

In conclusion, SP and SAP researchers can use our integrated methodology to advance a

shared agenda by combining insights to explore multiple manifestations of strategy, the practices giving rise to them, and their consequences. It also opens up further opportunities for bridging. There is scope to build upon SAP work on discourse, resistance and political dynamics to shed light on the V-S-R framework and its implications for practitioners: various forms of discourse may not only delimit the range of variations 'sayable' and therefore possible, but may also affect how 'variations' come to be defined as such in praxis; the selection of projects for resourcing seems likely to involve political struggle among actors; and attempts to retain projects by altering strategic and structural context seem likely to run into resistance. In this way, our methodology and the research agenda can facilitate dialogue between these two important traditions and broaden our vision of what strategy is, as well as deepen our understanding of it.

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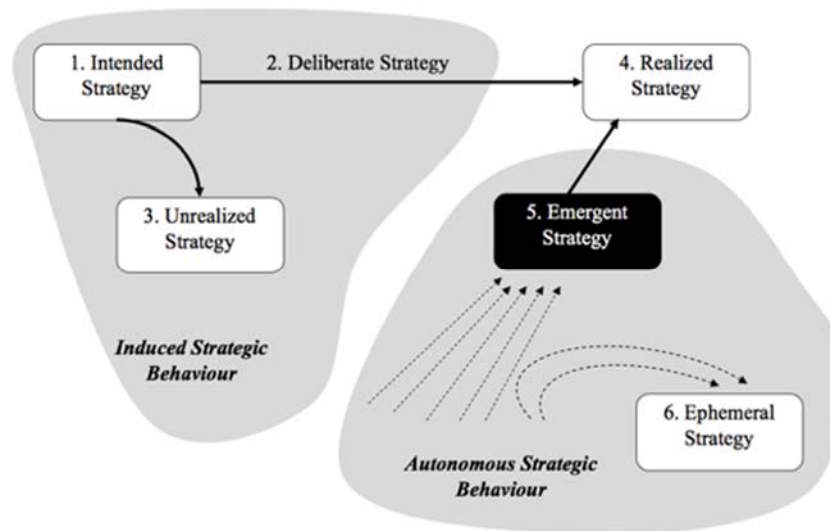


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## TABLES AND FIGURES

**Table 1: An integrated methodology for the study of manifestations of strategy**

Stage	Description	Manifestation of Strategy
Stage 1: Tracking strategy as discourse	Tracking strategic categories (cf. Burgelman, 1983) at three levels (corporate, business, operational) for each time period	1. Intended strategy
Stage 2: Tracking strategy as action	Tracking activities (projects, cf. Kaplan, 2011) over time and identifying those that endure	4. Realized strategy
Stage 3: Analyzing consonance and dissonance	Comparing discourse and action by assessing consonance between individual strategic categories and projects; classifying projects as induced or autonomous (cf. Mirabeau & Maguire, 2014)	2. Deliberate strategy 3. Unrealized strategy 5. Emergent strategy 6. Ephemeral strategy



**Figure 1: Six manifestations of strategy (adapted from Mirabeau & Maguire, 2014)**

$$SC^n = \begin{pmatrix} C_1^1 & C_1^1 & \dots & \dots & \dots & \dots & \dots & C_1^1 \\ C_1^2 & C_1^2 & \dots & \dots & \dots & \dots & \dots & C_1^2 \\ \dots & \dots & \dots & \dots & \dots & \dots & \dots & \dots \\ C_1^I & C_1^I & \dots & \dots & \dots & \dots & \dots & C_1^I \\ B_1^1 & B_1^1 & \dots & \dots & \dots & \dots & \dots & B_1^1 \\ B_1^2 & B_1^2 & \dots & \dots & \dots & \dots & \dots & B_1^2 \\ \dots & \dots & \dots & \dots & \dots & \dots & \dots & \dots \\ B_1^J & B_1^J & \dots & \dots & \dots & \dots & \dots & B_1^J \\ F_1^1 & F_1^1 & \dots & \dots & \dots & \dots & \dots & F_1^1 \\ F_1^2 & F_1^2 & \dots & \dots & \dots & \dots & \dots & F_1^2 \\ \dots & \dots & \dots & \dots & \dots & \dots & \dots & \dots \\ F_1^K & F_1^K & \dots & \dots & \dots & \dots & \dots & F_1^K \end{pmatrix}$$

**Figure 2: Strategic categories over time**

### Legend

SC = array of strategic categories for all time periods covered by the study

T = total number of time periods covered by the study

$C^i$  =  $i^{\text{th}}$  strategic category related to corporate strategy

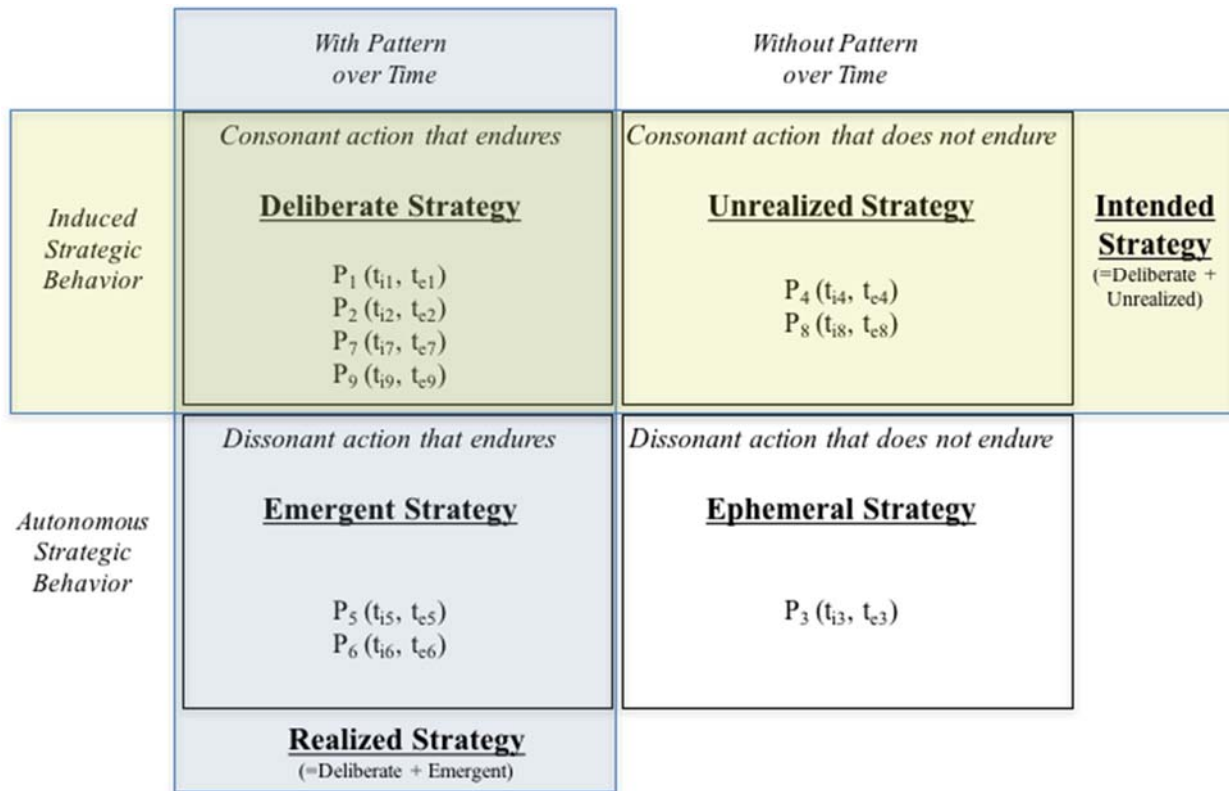
I = total number of strategic categories related to corporate strategy

$B^j$  =  $j^{\text{th}}$  strategic category related to business strategy

J = total number of strategic categories related to business strategy

$F^k$  =  $k^{\text{th}}$  strategic category related to operational strategy

K = total number of strategic categories related to operational strategy



**Figure 3: Illustration of different manifestations of strategy**  
 (adapted from Mirabeau & Maguire, 2014)

### Legend

$P_r$  =  $r^{\text{th}}$  strategic project

$t_{ir}$  = time period of inception of  $r^{\text{th}}$  strategic project

$t_{er}$  = time period of end of  $r^{\text{th}}$  strategic project