How do we research strategizing?

Simple answer: We go out and look

- Observations of strategizing in vivo (retreats; conversations; meetings; shadowing strategists)
- Collecting interpretations of strategy practices (interviews; diaries; focus groups; questionnaires)
- Collecting the artefacts of strategizing (minutes of meetings; plans; reports; flip-charts, etc.)

Emphasis on qualitative data
Some examples

- Langley (ASQ 1989; Org Studies 1990)
  - The roles of formal analysis in strategic decision making
- Gioia et al. (SMJ 1992; Org Science, 1994):
  - Sense-making and sense-giving in strategic change initiation
- Jarzabkowski (JMS 2002; 2003):
  - Strategizing among TMTs in UK universities
- Balogun and Johnson (AMJ 2004)
  - How middle managers shape strategic change
- Samra-Fredericks (JMS 2003)
  - Strategy as lived experience and strategists’ every-day efforts to shape strategic direction
- Eisenhardt et al. (AMJ 1988; 1989)
  - Strategic decision making in high velocity environments

Langley: How is formal analysis used in strategic decisions? Research design

Level 1: Individual analysis studies (n = 183)
- Study 1
- Study 2
- Study 3
- Study 4
- Study 5
- Study 6

Level 2: Strategic issues (n = 27)
- Issue 1
- Issue 2
- Issue 3

Level 3: Organizations (n = 3)
- Organization 1
- Organization 2
  - Prof Bur.
- Organization 3
  - Adhocracy
Langley: The role of analysis is related to the social context for strategic decisions

- **Information**
  - “I need to do analysis to get information - as much information as possible.”

- **Communication**
  - “I prepared the file because I knew we had to justify the project.”

- **Direction and Control**
  - “But people have to meet their objectives

- **Symbolic Purposes**
  - “Nobody is going to read that report. But it gives the impression that we’re concerned and that we’re going to do something about it”

Salma-Fredericks (2003)

- Recording of conversations among six strategists in a manufacturing firm
- Micro-examination of interactions through conversation analysis
- Identification of the discursive strategies used by the most influential strategist to persuade others of the need for a new strategy framework
Challenges and choices in researching micro-strategy

- Unit of analysis
  - Focused (strategists, retreats) or broad (strategic decisions)?
- Interpreting interview data
  - Fact, cognition or discourse?
- Gaining access & at what price?
- Reaching beyond « mere » description
  - Suggestion - build on comparisons
- The usual suspects: Legitimizing qualitative research
  - Credibility when researcher is instrument
  - Generalizability

Challenges of micro-strategy research 1

- What is appropriate unit of analysis?
  - Focused: people, artefacts, events (strategic planners, CEOs, plans, strategy retreats/ workshops, tools)?
  - Broad: strategic decisions, top management team, everything, nothing?

- Capturing what is relevant to strategy without drowning in ambiguity
Challenges of micro-strategy research 2

- What do data represent?
  - Facts? What happened?
  - Cognitions, sensemaking?
  - Discursive strategies?

- Whose interpretations? Self/ respondent?

- Need for awareness, positioning, and consistency

Challenges of micro-strategy research 3

- Gaining access
  - Strategic management processes are often highly confidential and sensitive

- Price of access
  - Neutrality vs. engagement???
Challenges of micro-strategy research 4:

Making a contribution - reaching beyond description?

Suggestion: design to compare
- Compare incidences/ people to create typologies
- Compare cases to show generality or explain differences/ outcomes
- Compare data with theory (ies) or “received views”
- Compare sub-units within cases (issues; org sub-units)
- Compare time periods to replicate dynamics...

Challenges of micro-strategy research 5: The usual suspects

Legitimizing qualitative research
- Subjectivity
  - How to ensure the credibility of research that is based on the researcher as instrument
- Generalizability
  - How to justify results based on small samples

Qualitative research can and must be rigorous
This does not mean distorting its particular strengths (including access to richness and the benefits of subjectivity)
Conclusion

- Research on strategizing demands in-depth data on strategists in action
- Research on strategizing promises to be challenging and exciting:
  - room for methodological innovation
  - room for new theoretical insight

Issues of "subjectivity" during qualitative data collection

- Access to situations
  - Rapport with people

- Proximity to phenomenon
  + Risk of contamination (effect of the researcher on the phenomenon)
  + Risk of "going native" (becoming socialized to the point of not seeing things)

- Quality of data
  + Risk of political alignment (loss of neutrality)

To attenuate the risks:
- Multiple sources
- Multiple researchers
- Insider/outsider/peer review
- Make biases explicit
Issues of "subjectivity" during data analysis & interpretation

- Richness and depth of qualitative data
- Saturation and authenticity
- Credibility of interpretation
- Ambiguity in interpretation

To attenuate the concerns:
- Exhaustive documentation of analysis
- Member check: validation with informants
- Multiple researchers (double coding)
- Triangulate with quantitative data
- Field sites named?

Different approaches to generalizability in qualitative research

- **Transferability**: The important thing is to provide sufficient in-depth contextual information so that the reader can judge transferability to another situation.
- **Accent on analytic generalizability (to theory) rather than empirical generalizability (to population)**. Each case provides a complete test of a theory (much like an experiment).
- **Replication on polar cases** – if the same phenomenon occurs in very different situations, it is more likely to be general.
- **Generalizability is not relevant** – qualitative research is interested in the particular, not the general.