Academy of Management
Pre-Registration PDW

Researching and Publishing in Strategy-as-Practice

5 August, 2007
9.00-11.50

Welcome!
## Strategy-as-Practice PDW

### Schedule

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<th>Time</th>
<th>Event</th>
<th>Presenter(s)</th>
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<tr>
<td>9.00-9.40</td>
<td>Introducing SAP&lt;br&gt;How to Research SAP&lt;br&gt;Publishing in Journals&lt;br&gt;Discussion</td>
<td>Richard Whittington&lt;br&gt;Ann Langley&lt;br&gt;Julia Balogun&lt;br&gt;All</td>
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<td>9.40-11.00</td>
<td>Paper Round-tables&lt;br&gt;Coffee</td>
<td>Facilitators&lt;br&gt;Cambridge Univ. Press</td>
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<td>11.00-11.50</td>
<td>Editors’ Panel</td>
<td>Martha Feldman (Org Sci)&lt;br&gt;Steve Floyd (JMS)&lt;br&gt;Royston Greenwood (SO)</td>
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Introducing Strategy-as-Practice

Strategy is something people do

- not just a property of organizations

Strategy as an activity implies close attention to:

- the processes of strategy formation: praxis, practices, practitioners

- the content of strategies: routines, capabilities, practices

- micro, meso and macro outcomes: e.g. performance of practitioners, spread and impact of practices, accomplishment of praxis …
Some Theoretical Resources for SAP

Social Theories of Practice

Philosophical Pragmatism

Institutionalist Theories

Actor Network Theory

Carnegie Tradition: Sensemaking and Routines

Situated Learning

‘Macro’

‘Micro’

Content

Process

Publishing: the Theoretical Challenge

Discovery Mode + Explanatory Mode

Routines matter … when, when not?
Practices common … where, where not?
Practitioners influential … how, how not?
and so on…
How do we research strategy as practice?

Ann Langley, HEC Montréal
Academy of Management PDW
Philadelphia, August 2007
Methodological Resources
Emphasis on Qualitative Data

- Observations of strategy practices
  (retreats; conversations; meetings; shadowing)

- Interpretations of strategy practices
  (interviews; diaries; focus groups; questionnaires)

- Artefacts of strategy practice
  (minutes of meetings; plans; reports; flip-charts)
Some interesting methods for capturing Strategy-as-Practice

- Collect « practice narratives » of strategists at regular intervals over long periods of time
- Diaries - e.g., respondents note down their reactions - Balogun & Johnson (2005).
- Videos, photographs - e.g., film meetings and ask for informants’ interpretations – Stronz (2005)
- Trace strategy document versions and what happens between them (paper or electronic)
- Become an apprentice strategist and note down experiences, learnings and feelings
Practical challenges of research on Strategy-as-Practice 1

• **Units of analysis**
  – Limits of focusing only on activity labelled «strategic» \(\rightarrow\) one might miss the practices that really constitute strategy
  – But then, what is not strategic?

• **Access and its price**
  – Sensitivity of «strategic» issues/discussions
  – Ethical + practical issues of involvement/ neutrality
Practical challenges of research on Strategy-as-Practice 2:

• *The usual suspects*

• **Subjectivity/credibility**: how to sustain the credibility of approaches that often rely on the researcher as instrument?

• **Contribution**: how to get beyond pure description to generate valuable insight?

• **Generalizability**: how to justify the relevance of results to others - given the stickiness and contextuality of practical knowledge?
Illustrative Papers: Help us to see how to meet the challenges

- Samra-Fredericks, D (2003). Strategizing as Lived Experience and Strategists Everyday Efforts to Shape Strategic Direction, *JMS*, 40, 1, 141-174
- PT Bürgi, CD Jacobs, J. Roos (2005), From Metaphor to Practice in the Crafting of Strategy, *JMI*, 14, 1, 78-94
Issues of "subjectivity" during qualitative data collection

To attenuate the risks:
- Multiple sources
- Multiple researchers
- Insider/outside/peer review
- Make biases explicit

- Risk of contamination (effect of the researcher on the phenomenon)
- Risk of "going native" (becoming socialized to the point of not seeing things)
- Risk of political alignment (loss of neutrality)

Proximity to phenomenon

Access to situations
Rapport with people

Quality of data

+ Access to situations
+ Rapport with people
+ To attenuate the risks
+ Quality of data

- Risk of contamination
- Risk of "going native"
- Risk of political alignment
Issues of "subjectivity" during data analysis & interpretation

- Richness and depth of qualitative data
- Ambiguity in interpretation
- Saturation and authenticity
- Credibility of 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?
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…
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.
Publishing in Journals:
Learning Points from the HR SI on SAP

Julia Balogun
Typical Problems with SAP Research

1. Connecting detail of practices with organisational (or other) outcomes
2. Use of theory (or rather lack of it)
3. Inadequate explanation of data analysis
4. Lack of linkage through theory → method → data / story presentation → conclusions
5. Explaining the journey rather than the conclusions
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Round-Tables


Richard Whittington: Burgi P., Jacobs C. and Roos J. (2005), Themes: publishing action research; non-traditional data reporting


