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Organizing an Online Community for Open Strategizing in a Large Organization

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by

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The candidate confirms that the work submitted is her own and that appropriate credit has been given where reference has been made to the work of others.

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Abstract

The creation of an online strategy community is increasingly attractive for companies as a mean to make the strategy process more inclusive and open. However, the fundamental difference between the flexible approach of open strategizing afforded by an online community and more controlled approaches of the traditional strategy formulation and implementation posits fundamental challenges for co-existence of these two processes. I argue that for these two processes to effectively co-exist, complex bridging process needs to take place in organizations. Furthermore, effective co-existence implies that open strategizing within an online community influences the formal strategy-making process.

This thesis explores an online community as a distinct form of open strategizing in a large organization, to address two interdependent research questions related to organizing an online community for strategic influence: (1) '*How do managers bridge open strategizing within an online community and formal strategy-making, characterized by closed and hierarchical decision-making?*' and (2) *'How do managers organize an online strategy community to influence strategic decision-making in large organizations?'*.

This in-depth inductive single case study investigates strategy professionals at a large telecommunications firm Telco that instigated a unique online strategy platform to increase the openness of participation and to influence the formal strategy process. This empirical study utilizes multiple sources of data including interviews, online community logs, observations, and document analysis, the findings of which are summarized in two theoretical models.

I identify three mechanisms that enable bridging between different strategizing processes, namely: 1) bidirectional framing with strategic concepts; 2) bidirectional structuring of communication; 3) building legitimacy of openness. The simultaneous enactment of three bridging mechanisms provides the greater influence of the formal decision-making process. Furthermore, I identify three main decision areas that managers have to consider carefully when organizing and online strategy community: 1) design of an online community structure; 2) cooperation of internal and external actors; 3) formulation of adequate strategic content. These decision areas are characterized by interdependencies and trigger contradictory demands that make open strategy processes a paramount organizational challenge.

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Lists of Tables and Illustrative Material

Abbreviations

Abbreviation	Key term
ABV	Attention-Based View
AI	Artificial Intelligence
BC	Blockchain
BCG	Boston Consulting Group
BU	Business Unit
CEO	Chief Executive Officer
CTO	Chief Technology Officer
ESSL	Education, Social Science and Law
GF	Group Function
GSB	Group Strategy Board
GPB	Group Portfolio Board
HR	Human Resources
ICT	Information and Communication Technologies
IT	Information Technologies
IoT	Internet of Things
MA	Market Area
MBA	Master of Business Administration
MM	Middle-managers
M&A	Mergers and Acquisitions
R&D	Research and Development
SaP	Strategy-as-Practice
SG	Strategy Group
SP	Strategy Perspectives
SWOT	Strengths Weaknesses Opportunities Threats
TMT	Top Management Team
QC	Quantum Computing
VBA	Visual Basic for Applications

Chapter 1. Introduction

This thesis investigates the emergence and development of an online community, dedicated to formulating strategic insights that aspire to influence the strategy-making process at a large organization. Use of online strategy communities is seen as a distinct and novel organizational form of open strategizing, whereby openness refers to the increased inclusivity (the variety of actors involved into the strategizing process) and transparency (the degree of access to information about strategic decisions) (Whittington et al., 2011). Although inclusivity in the process of strategy-making has been considered in the strategic management literature previously (Floyd and Wooldridge, 1992; Floyd and Wooldridge, 1997; Andersen, 2004; Wooldridge et al., 2008) it has gained further impetus in the last few years with the increasing use of digital technologies, as well as broader societal and environmental shifts necessitating greater transparency from organizations (Whittington et al., 2011). For instance, the increased international scope of organizations challenged the benefits of centralized strategic planning (Grant, 2003), while the increased risk of takeovers and rise of the ecosystem perspective has stimulated more transparent communications about a business' potential (Gegenhuber and Dobusch, 2017; Yakis-Douglas et al., 2017). From a cultural perspective, the popularity of business and strategy education (Pfeffer and Fong, 2002) has enabled a broader variety of organizational actors to join strategy discussions (Collier et al., 2004), whilst greater societal demand for transparency and professional mobility has contributed to strategy becoming less opaque (Denis et al., 2006). Finally, the ubiquity of information technologies (IT) has afforded greater inclusivity in strategy-making, through the use of collaboration tools and accessibility of the Internet and social media platforms (Kaplan, 2011; Baptista et al., 2017; Birkinshaw, 2017; Haefliger et al., 2011).

The greater transparency and inclusivity enabled by the accessibility of IT has created new opportunities for organizations to change and enhance their strategy-making processes (Whittington, 2014). Existing research provides evidence that open approaches to strategizing[1] offers great potential for organizations through improved quality of decision-making (Stieger et al., 2012), increased commitment to the shared strategic sense-making (Ketokivi and Castañer, 2004), organizational reflexivity

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[1] The term 'strategizing' here is adopted from strategy-as-practice perspective and that concerned with activities of managing strategy rather than with strategy as something what organization has (Whittington, 2003).

(Baptista et al., 2017), and sense of community (Hutter et al., 2017). Open strategizing is particularly relevant for organizations operating in turbulent environments, as they are continuously pressured by the need for strategic agility (Doz and Kosonen, 2008). The more inclusive and participative strategic dialogue fosters awareness about emerging trends and new opportunities and therefore enhances strategic sensitivity, which is one of the building blocks of strategic agility. Strategic sensitivity therefore implies an ability for continuous scanning and identification of strategic issues and strategic opportunities not only from the centre of organization but also in its periphery or even from outside of organization. Hence, open strategy offers various practices that afford rapid access to the knowledge and expertise of diverse individuals within and outside of organization (Hautz et al., 2017) that can enhance strategic issue management.

Although the existing strategic management literature describes strategy-making as a distributed process (Wooldridge and Floyd, 1990; Lovas and Ghoshal, 2000; Noda and Bower, 1996) that integrates induced and autonomous activities (Burgelman, 1983), the open strategy literature recognizes the fundamental differences between traditional and open approaches to strategizing: the systematic and controlled approach of a historically hierarchical strategy-making process differs substantially from the flexible and inclusive approach of open strategizing (Birkinshaw, 2017; Heracleous et al., 2018). Hence, these two approaches adhere to different organizing logics (Sambamurthy and Zmud, 2000). Nevertheless, to yield the benefits of open strategy-making, it needs – to some degree – to be integrated with the existing strategy context of an organization (Whittington, 2019) while also to remain differentiated from more formal and rigid practices of formal strategizing. The situation of co-existence of two different strategy processes based on two different logics without developing prevalence of one logic over another raises the issue of bridging (Purdy and Gray, 2009; Tracey et al., 2011; Smets et al., 2015). The understanding of mechanisms that affords efficient bridging between novel open strategizing practices (Birkinshaw, 2008) and the complex system of established strategizing practices that are routinized within organizations (Hendry and Seidl, 2003) has potential to provide valuable theoretical insight, not only for open strategizing literature (Hautz et al;., 2019), but also enhance our understanding of links between micro-practices and organizational level processes (Kouamé and Langley, 2018).

The challenge of bridging, arising from the concurrent use of two distinct types of strategizing, also raises the issue of the impact of open strategizing on organizational decision-making (Hautz et al., 2017). Existing studies mainly investigate open initiatives instigated or driven by higher-level management (Luedicke et al., 2017; Hutter et al., 2017; Malhotra et al., 2017) which assumes the direct integration of insights generated through open collaboration into the organizational decision-making process. Although the strategy process literature suggests that middle-level managers can influence strategy through championing activities (Floyd and Wooldridge, 1992; Floyd and Wooldridge, 1997) and issue-selling (Dutton and Ashford, 1993; Dutton et al., 1997; Dutton et al., 2001), the investigation of open strategy organizing provides an intriguing context for further understanding strategic influence in an organization. On the one hand, the collaboration of multiple actors with diverse expertise and hierarchical status creates a risk of conflict (Malhotra et al., 2017), political contestation (Kaplan, 2008) and power asymmetries (Miller et al., 2008; Pappas and Wooldridge, 2007) that hinder coordination (Andersen, 2004) and makes the process of open collaboration for strategic issues identification more complex and uncontrolled (Hautz, et al. 2017). On the other hand, for the creation of influence, the collaboratively created insights have to reach the strategic agenda of the organization and therefore gain the attention of top managers (Ocasio and Joseph, 2005). Hence, to create an impact on organizational strategy, the initiatives and issues identified in the process of open strategizing have to compete for the managerial attention with a variety of alternative initiatives and issues identified elsewhere (Ocasio, 1997).

Finally, open strategy scholars recognize a strong relevance of IT for this approach (Morton et al., 2019), that allows the 'massification' of strategy (Whittington, 2015). Numerous large organizations such as IBM, HSBC, Atos, Phillips, Virgin Media utilize various forms of online platforms for open strategizing through the creation of blogs, chats and internet forums (Baptista et al., 2017). The use of online platforms can be broadly divided into two streams: strategic ideation contests (Hutter et al., 2017) and collaborative communities (Baptista et al., 2017). The former is similar to innovation crowdsourcing (Afuah and Tucci, 2012) where self-selected members of crowds individually engage in problem-solving exercises that are characterized by well-defined evaluation and selection criteria (Aten and Thomas, 2016; Hutter et al., 2017; Malhotra et al., 2017; Stieger et al., 2012). Differing slightly, online communities refer to a voluntarily collective of diverse individuals collaborating by means of the

Internet, who share common or complementary interests, create and use content, and discuss relevant problems (Faraj et al. 2011; Olson, 2009; Preece 2000; Sproull and Arriaga, 2007). In this collaborative approach, value is created through aggregation of diverse contributions into a coherent whole. Hence, community collaboration platforms are characterized by interactions amongst a group of diverse actors, who possess a common identity for knowledge sharing, identification of strategic issues, or creation of shared strategic understanding (Baptista et al., 2017; Boudreau and Lakhani, 2013; Dobusch and Kapeller, 2018). Existing empirical research on strategic online communities has almost exclusively focused on organizations which have an inherently open nature, such as Wikimedia (Dobusch et al., 2017; Dobusch and Kapeller, 2018; Heracleous et al., 2018). Therefore, the investigation of open strategizing through the creation of online collaborative communities in for-profit organizations, that have historically relied on more conventional and closed strategy processes, offers a fruitful empirical context that raises questions relevant to open strategy. Although contradictory demands of openness and closedness are broadly recognized (Dobusch et al., 2017), online community literature provides further insights around balancing of openness and control (West and O'Mahony, 2008; Jarvenpaa and Lang, 2011) in participation (Malinen, 2015) and content creation (Kane et al., 2013; Majchrzak et al., 2013) that exposes the challenges of managing permeability of community boundaries (Faraj et al., 2011) and its content. The inclusion (or exclusion) of participation and particular strategic topics, is highly characteristic for an online community deployed in an established organization characterized by highly sensitive strategy content and multiple organizational interests.

Hence the organizing of open strategy initiatives in large organizations posits two fundamental issues: the issue of bridging between open and formal strategy-making processes, and the issue of the influence of open strategy initiative on organizational decision-making. These issues motivate two research questions, which this thesis addresses:

1) *How do managers bridge open strategizing within an online community and formal strategy-making, characterized by closed and hierarchical decision-making?*

2) *How do managers organize an online strategy community to influence strategic decision-making in large organizations?*

Through these research questions, I conceptualize how open strategy organizing occurs within a large commercial organization. The major contributions of this thesis are to detail the mechanisms that enable bridging to take place between the open and formal strategizing within the organization, and to explain a set of decision areas that organizational actors must consider when managing an open strategizing initiative. A better understanding of bridging mechanisms contributes to the open strategy literature, and provides understanding of combinatory perspective on strategy-making (Burgelman et al., 2018) by elucidating the links between micro-practices of open strategizing and the larger strategy-making process (Kouamé and Langley, 2018). Moreover, the findings of this thesis provide insights into the implications of greater openness of strategy-making for strategy professionals (Whittington et al., 2011). Finally, investigating open strategy organizing in a large organization provides an improved appreciation of the challenges that strategy practitioners face in their day-to-day work, contributing to the SaP literature more generally (Whittington, 2006).

This study adopts a strategy-as-practice perspective (SaP), which conceptualizes strategy as a situated stream of activities accomplished through the social interactions of multiple actors (Jarzabkowski, 2005). SaP emphasizes the organizational practices, praxis and practitioners (Whittington, 2006; Jarzabkowski and Seidl, 2008), and is therefore a useful lens with which to delve into the everyday practices of organizational actors involved in organizing an online strategy community, participating in community discussions, and using the outputs generated through online collaboration. Hence, the SaP perspective enables to focus on practices of open strategizing enacted by organizational actors in the context of a particular organization (Jarzabkopwski, 2003). Furthermore, SaP allows for a more dynamic conceptualization of practices used to manage the demands of different organizing logics of formal strategy-making and open strategizing (Smets et al., 2015).

Using a longitudinal, interpretive case-study approach (Yin, 2003) and ethnographic data collection techniques (Van Maanen, 1979), I studied Telco (pseudonym), a Swedish multinational telecommunication corporation. Telco is a large for-profit organization with more than 95 thousand employees and customers in 180 countries with hierarchical organizational structure and established process of strategy-making. Telco operates in a turbulent environment, where convergence between ICT (Information and Communication Technologies) and telecommunication industries constantly challenges the organization to remain strategically agile. In an

attempt to address this challenge, professional strategists at Telco initiated an open strategy initiative in 2014, using an online strategy community, which I was able to observe in real-time and with a high level of immersion, owing to a collaborative research grant agreement. Thus, Telco was a revelatory case (Siggelkow, 2007) to help develop theory about open strategy organizing in for-profit organizations.

This thesis addresses two interrelated questions. However, I treat these research questions as two separate research projects. Both research questions are theoretically informed by three streams of literature (Chapter 2) and both studies are designed as single case-studies (Chapter 3). Further, both rely on data collected in one research setting (Chapter 4). However, each of the research questions required different focus in the data collection process and analysis that I describe in the Methodology section (Sub-chapter 3.3). Furthermore, I dedicate separate Findings and Discussion sections for each research question. Hence, the Findings and Discussion related to Research Question 1 are described in Sub-chapters 5.2, 5.3, 6.1, while findings and Discussion related to Research Question 2 described in sub-chapters 5.4, 6.2. Further, the Contribution to the literature (Sub-chapter 6.3) and Managerial implications (Sub-chapter 6.4) are drawn jointly from two research projects. Finally, I conclude this thesis with Chapter 7 that describes overall contributions, suggestions for future research and acknowledgements of the limitations based on both research projects.

Chapter 2. Literature Review

This chapter reviews the different streams of literature that informed this research project (as summarised in Figure 1). The main aim of this literature review is to discuss the literature on strategy-making from both the process and practice perspectives, whilst also engaging with the more recent literature on open strategy. By identifying issues that exist within these streams of literature, I then justify the two central research questions, which are discussed in the concluding chapter.
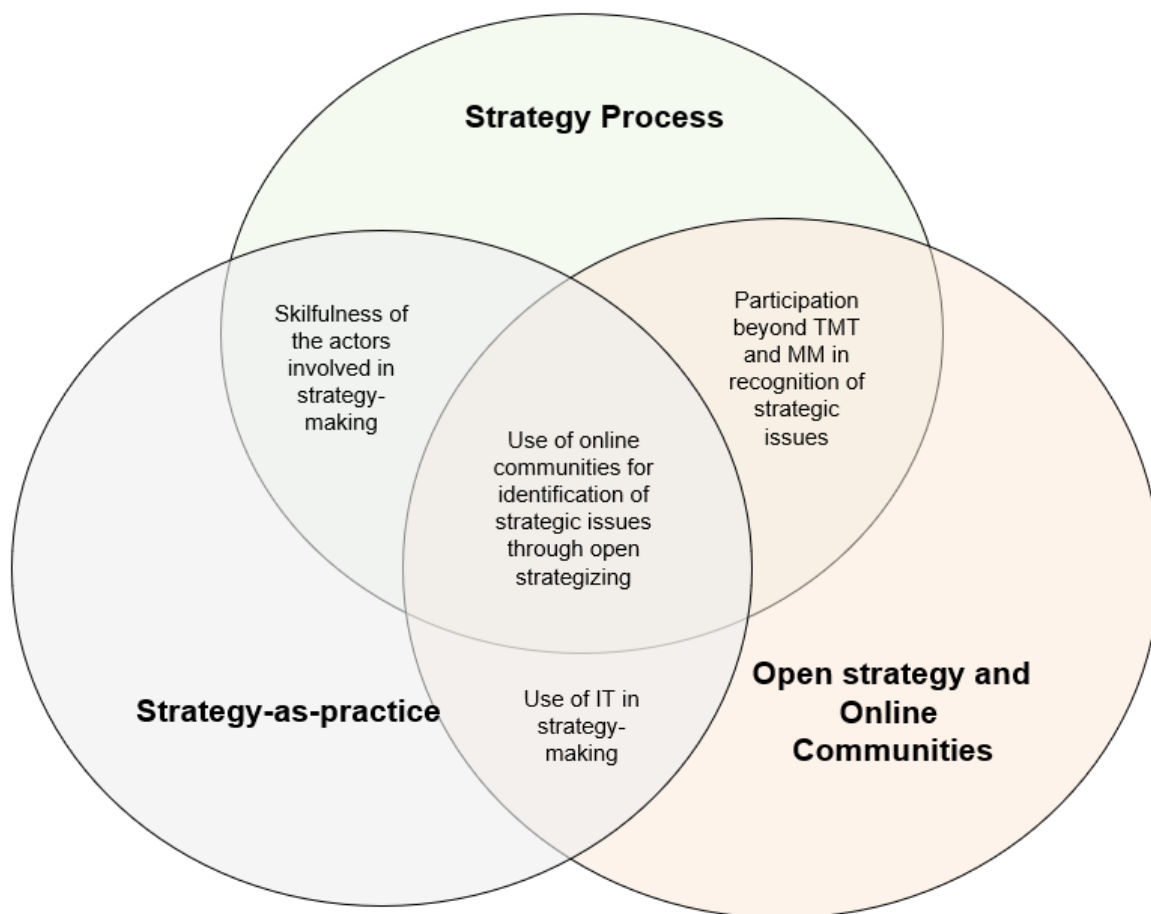
Figure 1. The overview of the relevant literature

The review begins with the introduction of strategy process literature that provided an alternative to strategy content research perspective on studying strategy-making within organizations[2]. A strategy process perspective focuses on how strategic

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[2] In a broad sense, the field of strategic management is concerned with the understanding of heterogenous firm performance (Durand et al., 2017). The discussed in this chapter literature streams acknowledge that organizational strategy-making processes and practices can be a source of such performance heterogeneity.

decisions are shaped and implemented within a company (Chakravarthy and Doz, 1992), and assumes that strategy-making is highly distributed process. Authors such as Mintzberg (1978), Burgelman (1983), Wooldridge and Floyd (1990), Lovas and Ghoshal (2000) all argue that strategic processes consist of multiple strategic activities that are driven by induced actions of higher-level management and autonomous actions of mostly middle-level managers[3]. This literature recognises the prominence of middle-managers in strategy-making and argues for the importance of their social and political skilfulness in recognizing and championing strategic initiatives.

The review then moves on to consider the strategy-as-practice (SaP) literature, which has taken the notion of distributed strategy-making even further by considering it as a social activity involving multiple actors within an organization. Hence, SaP is much more concerned with "strategy as activity in organizations, typically the interaction of people, rather than strategy as the property of organizations" (Johnson et al., 2011, p. 3) and sees strategy-making as the "myriad of activities that lead to the creation of organizational strategies" (Vaara and Whittington, 2012, p.287). The attention to the activities of organizational actors and the way they enact them emphasize the centrality of actors' skilfulness. Authors like Kaplan (2011), Jarzabkowski and Kaplan (2015), Rindova et al. (2011), Mirabeau and Maguire (2014), Knight et al. (2018) emphasizing the importance of skilful use of strategy tools, rhetorical and discursive practices, strategic framing and ability to visualise and consequently a particular body of knowledge and institutional coherence of strategy-making practices. In this way, SaP furthers the strategy process literature's focus on the actors involved in organizational strategizing and their skilfulness by adopting a broader perspective on who is considered to be a strategist, going well beyond political skilfulness by emphasizing other communicative and socio-material competences.

Finally, the more recent open strategy literature has developed from the SaP perspective, and considers "dynamic bundle of practices that affords internal and external actors' greater strategic transparency and/or inclusion" (Hautz, et al.2017, p.299). This stream of literature advocates the great potential of open practices to recognize and realize novel organizational opportunities and strategic initiatives.

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[3] In accordance with Burgelman (1983) induced actions refer to the activities aligned with the existing corporate strategy, whilst autonomous actions refer to the activities related to introducing new business opportunities or processes divergent from the existing corporate strategy. The term of 'induced' and 'autonomous' actions used throughout the thesis.

Although inclusion was considered in strategy process literature, and the roles of strategy tools were acknowledged in SaP literature, open strategy research combines these notions and explores the utilization of various practices and tools for increased inclusion of actors beyond top and middle-management and transparency of the strategy-making process (Whittington et al., 2011). However, the implementation of open practices triggers a number of underlying tensions and dilemmas that have to be carefully considered (Dobusch et al., 2018; Heraclious et al., 2018). Whilst open strategy scholars acknowledge the utilization of online communities as one of the ways to enact open strategizing (Baptista et al., 2017; Dobusch and Kapeller, 2018), a closer look at online community literature[4] provides insights into the affordances that online communities provide (Leonardi and Vaast, 2017), as well as governance mechanisms and design decisions that define the collaboration dynamics (Reischauer and Mair, 2018; Ren et al., 2007) that are relevant for the understanding of openness in general.

These three bodies of literature are central for my study as they provide crucial building blocks for understanding the phenomenon of interest - open strategizing within a large organization. The open strategy can be seen as a source of innovative strategic ideas or strategically relevant information (Aten and Thomas, 2016) that can lead to a strategic change (Doz and Kosonen, 2008). Hence, open strategy has the potential to provide strategic agility to organizations through recognition of strategic issues and strategic initiatives. Similarly, the strategy process literature provides a deeper understanding of the processes of strategic issue recognition and management in the context of large organizations, specifically, the mechanisms that constrain or enable recognition of strategic issues such as structural and strategic context (Burgelman, 1983) or attentional structures (Ocasio, 1997). Finally, SaP provides a micro-perspective on activities of organizational actors (Johnson et al., 2003) that enact strategizing through their day-to-day activities in the context of structural and strategic context. Moreover, recent developments in the strategic management literature emphasize the potential of a combinatory view, using both process and practice perspectives to study strategy-making (Burgelman et al., 2018). The combinatory view acknowledges the induced nature of strategizing processes, manifested in systematic strategic events, but simultaneously accounts for practices

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[4] In the context of this thesis I treat online communities as a form of open strategizing. Therefore, I review online community literature as a sub-set of open strategy literature.

constituting emergent strategy in the situated context of an organization (Mirabeau and Maguire, 2014). Therefore, the use of both a strategy process and practice perspectives helps to understand the connections between organizational-level processes and micro-level practices (Kouamé and Langley, 2018), where open strategy offers a fruitful context to understand the intersection of these research streams. Bringing new open practices into an established strategizing process – which consists of complex networks of other strategic practices – requires an understanding of the greater strategy formation process and the practices which shape it.

2.1. Strategy-making as a distributed organizational process

Strategy process research is concerned with "how effective strategies are shaped within the firm and then validated and implemented efficiently" (Chakravarthy and Doz, 1992, p.5). This stream of literature diverged from research on strategy content – which was prevalent in strategic management before the 1980s – in its focus, contributions, and methodologies. From the strategy process perspective, strategy-making is a holistic process where strategy formulation cannot be separated from strategy implementation, differing from earlier views of strategic management in which the formulation and planning of strategy were assigned to the top decision-makers, and implementation to the line managers and front-line workers (Ansoff, 1965). Process research – like the content perspective – focused on the outcomes of strategy, but by understanding the organizational developments and strategic actions that preceded those outcomes (Hutzschenreuter and Kleindienst, 2006). Strategy process research goes beyond the rational view of decision-making, by considering the interactions of individuals, firms and/or environments, and their influence on the decision-making process, which is accepted to be socially intensive and cognitively bounded. Adopting this broader view has allowed strategy process to make contributions beyond understanding organizational choices and its relation to the performance, providing insights into how those choices are made through the interactions among individuals, groups and organizational units in strategy formulation and implementation (Chakravarthy and Doz, 1992). Methodologically, strategy process studies have utilized longitudinal approaches with direct access to organizations and organizational actors through interviews, field observations and ethnography (Van de Ven, 1992), whereas content studies would generally adopt a

variance analysis. Adopting a more immersed approach to data collection has afforded for richer explanations of strategy formation and implementation to be offered, capturing the multiple pathways of organizational events over time (Langley, 1999).

Given the motivation to understand the enduring process of strategy formation and implementation, process researchers often adopt an evolutionary perspective on strategy (Barnett and Burgelman, 1996). Evolutionary perspectives provide a dynamic understanding of organizational strategic change by explaining its pace and direction, unlike cross-sectional studies that capture the content of the strategic decision statically (Fahey and Christensen, 1986). A process perspective also helps to capture the variation in organizational strategies, rather than limiting them to a number of pre-defined options, by showing how new strategies emerge from within an organization (Burgelman, 1994) and thus allowing for the possibility of random strategy development. Process research also aims to elucidate the selection mechanisms used for new organizational strategies and strategic initiatives. The administrative systems (Lovas and Ghoshal, 2000), strategic and structural context (Burgelman, 1983; Noda and Bower, 1996), and issue–selling activities (Dutton et al., 2001) are the mechanisms for managers to bring to the attention of other managers new organizational opportunities (Ocasio, 1997), and for senior managers to decide on the resource allocation for the most promising opportunities. Finally, evolutionary perspectives acknowledge the historical embeddedness of organizational processes (Burgelman, 2002), detailing how past decisions and organizational routines can have an influence on the identification and selection of new organizational capabilities (Bingham et al., 2007).

The following chapters will provide a deeper look into the strategy process literature, first exploring the various process models of strategy-making, followed by the discussion of strategic issue management. I will then examine the literature on inclusivity in strategy-making processes.

2.1.1 Strategy-making as interplay of induced and autonomous activities

Over time, there have been numerous attempts to produce a generic model of the strategy-making process within an organization (Mintzberg, 1978; Burgelman, 1983; Noda and Bower, 1996; Lovas and Ghoshal, 2000). However, what unites these models is the absence of a dichotomy between strategy formulation and implementation: process models consider organizational strategy-making as an

integrated and distributed process among various organizational levels, where divergent streams of activities from the top and bottom of an organization are in continuous interaction. For instance, Mintzberg (1978) referred to the dichotomy of intended and emergent strategy, while Burgelman (1983) discussed induced and autonomous activities. The induced or intended strategy implied an explicit, planned and purposeful set of decisions created in a formalized manner (Mintzberg, 1978), aimed at the creation of organizational stability and clarity (Burgelman, 1983). In contrast, emergent strategy or autonomous behaviour is often developed in the periphery of the organization, by middle or operational level managers, through the identification of new opportunities and further championing towards top management. Such activities were triggered by environmental unpredictability and dynamism, and were therefore developed in a less structured and standardized fashion. Multiple initiatives, that are not always aligned with the existing corporate strategy, were selected through the administrative mechanisms and had the potential to change existing corporate level strategy. Later, Burgelman (1991, 1994) explained the relationship between induced and autonomous behaviours through the variation-selection-retention mechanism. Variation referred to the capacity to combine individual and organizational capabilities that are not recognized and employed by an organization currently. Selection of new initiatives was guided by the structural and strategic contexts of organization, where the former created selection criteria aligned with the existing strategic vision, and the latter allowed for choosing initiatives aligned with strategic vision post hoc. Finally, retention referred to continued possession of competences and capabilities rooted in organizational success and acquisition of resource to support new autonomous initiatives.

The later models continued building on the assumption of integrated top and bottom-up processes, but further elaborated on the relationships between multiple managerial levels. Noda and Bower (1996), capitalizing on the Bower-Burgelman model (Bower, 1970; Burgelman 1983), stressed the interconnectedness between top, middle and front-line managers in the process of continuous iteration of resource allocation. The strong strategic intent of top management was counterbalanced by entrepreneurial activities of the front-line managers that were further championed by middle-level managers to obtain resources. Hence, this model stated that organizational strategy is an outcome of the incremental commitment towards competing initiatives, rather than a clear statement induced by top managers (ibid,

p.188). Lovas and Ghoshal's (2000) model of strategy as guided evolution went further, by emphasizing the importance of top managers as stimulators of new initiatives rather than passive selectors of initiatives coming from the bottom-up of the organization. The authors described the how senior management could reduce the divide between induced and autonomous behaviour by having in place an appropriate administrative system and strategic intent. The importance of managerial resistance to strategic initiatives was also acknowledged by Friesl and Kwon (2017), as resistance generated further strategic discussion and therefore reframing, restructuring and recoupling of strategic initiatives. Additionally, the guided evolution model stressed the importance of human and social capital: the skills and competences of managers, as well as the relationships among them, had a strong effect on championing and selection of initiatives that determine the organizational strategy process. Informal communications amongst lower-level managers have also been shown to trigger emergent strategic processes (Balogun, 2003; Balogun and Johnson, 2004; Balogun and Johnson, 2005) bringing into greater focus the characteristics of managers in strategy processes (Hutzschenreuter and Kleindienst, 2006).

The continued exploration of the relationship between two divergent strategic activities brought attention to how they were balanced. As Burgelman (2002) demonstrated in his study of Intel between 1987 and 1998, the dedication to induced strategic intent created a co-evolutionary lock-in effect that decreased autonomous initiatives recognition. Ultimately, the devotion towards the induced strategy compromised the long-term survival of the company by decreasing its identification capabilities for new businesses. Ensuring balance between induced/deliberate and autonomous/emergent activities is therefore crucial to overcoming the issue of strategic dissonance (Burgelman and Grove, 1996). To achieve such balance, further research emphasized the importance of simulations use of strategic planning and autonomous actions (Andersen, 2000) or strategic planning and decentralized decision-making (2004), specifically in the context of the turbulent environment. Such combinations enable adaptive (Andersen and Nielsen, 2009) or generative (Liedtka, 2000) strategy-making that facilitates organizational responsiveness to environmental changes, and increase organizational performance. Similarly, conceptual work by Szulanski and Amin (2001) discussed the importance of combining discipline and imagination in strategy-making. According to these authors, combining the imagination

of multiple possible futures opportunities along with a systematic evaluation of such opportunities was key to successful strategy-making in rapidly changing reality. In Regnér's (2003) qualitative study, he investigated strategy-making within four multinational organizations and demonstrated a combination of convergent approaches to strategy-making in the centre and periphery of the organization. Hence, the deductive approaches in the corporate centre – with more standardized and structured activities such as planning, formal reports and routines of the organization – were combined with the more inductive approaches in the periphery of the organization, where externally oriented and experimental activities, such as understanding the external environment through contacts with external actors and a trial and error approach.

Process studies have emphasized the importance of two divergent types of activities. Although differing in their level of formality, origin and the types of managerial practices they involve, their balanced interplay is crucial for the formulation of organizational strategy. Whilst there is an expectation that in large organizations deliberate strategic activities can prevail due to priorities to create stability and coherence of strategic processes (Burgelman, 1983), there is a need for the stimulation of continuous autonomous activities.

2.1.2 Strategic issue identification and strategic initiatives selection as integral part of a strategy-making process

Strategic issues are events, developments or trends that are perceived by decision-makers as having the potential to affect their organization's performance (Ansoff, 1965). However, the recognition of strategic issues can happen in both a top-down or bottom-up manner. From a top-down perspective, top managers are continuously exposed to ambiguous data and vague stimuli, which they interpret and translate into clearer and more focused strategic issues (Dutton et al., 1983). Similarly, from a bottom-up perspective, middle-managers and/or lower-level employees can autonomously recognize environmental challenges and opportunities (Burgelman, 1983; Burgelman, 1991). Irrespective of the origin of the strategic issue, the response is usually manifested in the creation of a strategic initiative (Dutton and Duncan, 1987).

Strategic issues are more ambiguous and complex (Dutton et al., 1983) and typically have long-term orientation compare to tactical and operational issues (Dutton et al., 1990). The strategic issue management is concerned with how managers

recognize (Dutton, 1986b), categorize (Dutton and Jackson, 1987; Julian and Ofori-Dankwa, 2013) and respond to issues depending on their nature (Thomas and McDaniel, 1990) as well as how strategic initiatives come to the attention of senior decision-makers (Ocasio, 1997). The issue management process can be seen as a two-stage activity: first, issues are selected, before decisions are made on the selected issues. In this way it is possible to differentiate the literature on issue-selling – which is concerned with the former – while the decision-making literature focuses on the latter by providing insights into the cognitive processes of decision-making actors.

The selection of strategic issue often begins from its classification. Managers often categorize an issue as a threat or as an opportunity (Dutton and Jackson, 1987), crisis or non-crisis (Dutton, 1986a), or assess issues by their urgency, feasibility and interdependence with other issues (Dutton et al., 1990). Variation in issue perception leads to diverging processing and responses. For example, research demonstrates the diversity in the amount of attention, dedicated resources, level of control and search for the explanation of the issue (Dutton, 1986a; Dutton and Ashford, 1993) is based on issue characteristics like issue salience and sponsorship, as well as the number of issues under consideration (Dutton, 1986b; Laamanen et al., 2018). The interpretation of strategic issues also varies based on strategic and information-processing structures of an organization. Therefore, a greater ability for information processing by a top management team will likely lead to the issue being interpreted as more controllable and positive (Thomas and McDaniel, 1990). Organizational structures can also affect the recognition of strategic issues. Fredrickson (1986) argued that the level of organizational centralization, formality and complexity will affect issue recognition and consequential decision-making processes. Specifically, high levels of complexity decrease the ability to recognize novel opportunities as strategic; high levels of formality imply rigorous processes for the recognition of new strategic issues; and a high level of centralization limits the scope of actors involved in the identification of new strategic issues and opportunities.

Although the earlier strategy process literature was much more concerned with issue management (Thomas and McDaniel, 1990) and decision-making (Bourgeois and Eisenhardt, 1988; Eisenhardt and Bourgeois, 1988; Eisenhardt and Zbaracki, 1992) at the higher managerial levels, the increasing recognition of emergent strategy and importance of autonomous activities brought attention to the role of middle-level managers in the issue-selling process. The literature began to recognize that issue-

sellers characteristics, along with factors like issue framing, choice of selling channels and tactics, could lead to different outcomes in terms of issue recognition by top management, as well as individual outcomes for issue-sellers (Dutton and Ashford, 1993). Later, Dutton et al. (2001) tested some of these propositions and identified various strategies that shape issue-selling micro-processes, to help managers navigate the organizational context and gain top management attention. The rational justification of business case for a strategic initiative, as well as authority and credibility of managers promoting such initiatives, was found to have positive effects on strategic initiative recognition, particularly in the context of explorative initiatives (Lechner and Floyd, 2011).

The strategic issue management is also highly dependent on organizational attention structures consisting of rules, culture, political dynamics and leadership style (Ocasio and Joseph, 2008). Ocasio's attention-based view (ABV) further extended the understanding of strategic issue identification and response, explaining how individual managers situated in the context of organizational governance and operational channels focus their attention and respond to strategic issues (1997). The attention-based view recognized the cognitive limitation of managerial attention and emphasized how an organization's structural and communication channels can bring attention to what is considered to be "right" issues, as well as what the 'right' responses to deal with those issues might be. Hence, how information processing is organized within an organization, as well as the organizational positions of the group working on gathering strategically relevant information, will play a role in organizational adaptation to the continuously changing environment (Ocasio and Joseph, 2005). An ABV specifically emphasize the challenge for the multi-business global firms, where the perception of the issue may vary depending on the context, resulting in competition between organizational groups as they compete for the attention of higher-level management.

Although middle-level managers can gain the attention of decision-makers through the issue-selling process (Dutton and Ashford, 1993; Dutton et al., 2001), higher-level managers can also shape the attention of lower levels to make the identification of strategic initiatives more structured. For instance, whilst top management prioritises strategic fit over feasibility, operational managers and employees are guided primarily by feasibility, with middle-managers occupying the middle ground between the two and valuing both equally (Canales, 2015). In this

manner, top managers can shape the attention of middle-level managers by clearly defining organizational goals to broaden their focus beyond operational issues (Canales, 2013). In addition, a particular configuration of organizational structures can streamline managerial attention by drawing their awareness to the different types of opportunities (exploration or exploitation) (Ren and Guo, 2011). Similarly, the attention structures shape a group's shared emotions, which in turn influences the focus of their attention (Vuori and Huy, 2016).

With the increase of environmental turbulence (Selsky et al., 2007) and the need for organizations to continuously identify and seize strategic opportunities (Brown and Eisenhardt, 1997) researchers have increasingly investigated how managers focus on a particular set of issues or responses in the unknown environment. Eisenhardt and Bourgeois (1988) argued that decision-making processes vary depending on the issue complexity, whilst Gavetti et al. (2005) found that managers are able to successfully navigate unfamiliar environments by identifying characteristic similarities with domains in which they had already been successful. Doing so would then allow the managers to leverage their experience and prior solutions and thus take action. In this way, Gavetti and his co-authors emphasized that managerial characteristics, such as time spent in a particular industry, as well as the variety of industries worked in, can influence the solution they choose. Furthermore, research has found that the recognition of specific characteristics of strategic issues is also context- and time-dependent (Gavetti and Rivkin, 2007). Heuristics - the articulated rules of thumb shared by managers within a firm – are another way for managers to recognize and act upon new arising opportunities (Bingham et al., 2007). The ongoing learning of managers is captured into heuristics portfolios related to selection, procedures, timing and prioritizing of opportunities help them to make a faster decision (Bingham and Eisenhardt, 2011).

The strategic issue management literature has emphasized the role of lower-level managers and their attempts to bring strategic issues and initiatives to the attention of higher-level managers. It has also highlighted the role of higher-level managers in shaping the attention of lower-level employees, through the creation of information processing systems, organizational heuristics and organization's governance, as well as the communication channels used for strategic issue identification and management. Consequently, the way organizations design and structure their strategy formulation processes and information-processing will affect

the identification and selection of strategic-issues, that in turn will influence the organization's strategic actions.

2.1.3 Inclusion of middle-management in strategy-making process

As already discussed in an earlier chapter, the strategy process tradition sees strategy-making as a distributed activity, where organizational actors at different hierarchical levels implicitly or explicitly contribute to the strategy formulation and implementation process (Burgelman, 1983; Noda and Bower, 1996). This differs from the traditional view on strategy development, where it is restricted to the upper echelons of an organization (Andrews, 1971; Hambrick and Mason, 1984). From seeing middle-managers as providers of the inputs for strategic decision-making and implementors of strategy, the strategic management literature moved towards recognition of middle-managers as strategic influencers (Wooldridge et al., 2008). The early process models of the strategy-making of Mintzberg (1978) and Burgelman (1983) acknowledged the involvement of middle-managers in strategy through their autonomous behaviour, but the middle-manager role was recognized more explicitly much later. Wooldridge and Floyd's (1990) empirical research demonstrated that involving middle-managers in strategy-making could improve organizational performance through an enhanced shared understanding of the strategy process, and improved decision-making facilitated by the additional information and knowledge that middle-managers have access to. Westley (1990) explored the dynamics between top and middle-management in the context of the strategic conversation, and pointed out that the inclusion of middle-managers in strategic conversations can "energize" them and help them to make sense of organizational strategy. Consequently, Westley found that this could have a positive impact on strategy implementation, and consequently enhance organizational performance (Hart, 1992). Similarly, Bartlett and Ghoshal (1993) recognized middle-managers occupied roles beyond controlling operational activities, acting as a supporter of entrepreneurial activities, integrator of knowledge resources, and facilitator of organizational renewal.

Further research on middle-management has seen scholars begin to conceptualize their involvement in strategy processes through the different strategic roles they may hold. Floyd and Wooldridge (1992) theorize four different roles for middle-managers which involve directing upwards (championing alternatives; synthesizing information) or downwards influence (facilitating adaptability;

implementing strategy). Middle-management provides top management with up-to-date operational information that can facilitate amendments to strategic decisions (Dutton et al., 1997; Dutton et al., 2001) or indicate critical environmental changes that lead to strategic exit (Burgelman, 1994). Additionally, middle-managers promote ideas from the front-line of an organization (Kanter, 1982; Fulop, 1991) and play a crucial role in knowledge generation and transfer (Nonaka, 1994) that can contribute to organization's ability to innovate. Hence, a middle-manager's unique position within an organization, as a link between operational and corporate levels, allows them to collect, synthesize and process information from different sources and have a wider picture of organizational opportunities and threats (Floyd and Lane, 2000; Huy, 2001; Shi et al., 2009). Further positive impacts of middle-manager participation in the strategic planning process (Gerbing et al., 1994) derive from reduced goal ambiguity and position bias, along with increased identification with the organization and ownership of goals (Ketokivi and Castañer, 2004). In addition, greater participation and autonomy of organizational actors facilitate adaptive strategy-making that fosters organizational performance (Andersen and Nielsen, 2009).

Research has shown that involving middle-managers in the strategy process can yield numerous positive outcomes for organizations. However, negative effects may also arise due to political dynamics of strategy-making (Pfeffer and Salancik, 1974). Large organizations with multiple business units experience a challenge when it comes to aligning the multiple interests and agendas in the strategy-making processes. Asymmetries and participation biases can emerge as a consequence of the positions held by participants. According to Miller at al. (2008), the CEO, production and marketing divisions are the most influential in the strategy-making process, whereas the R&D, procurement and HR divisions often have little to no influence in decision-making. Additionally, managers in boundary-spanning positions, who interact with internal as well as external constituencies, have more influence on strategy than managers in non-boundary spanning positions (Pappas and Wooldridge, 2007). Therefore, pursuit of different agendas complicates the strategy-making process and create contestation between groups involved in strategy-making (Kaplan, 2008). Along with the aforementioned complexities, Ahearne et al. (2014) empirically demonstrated an inverted U-shape relationship between the degree of middle-management involvement in strategy-making through championing activities and organizational performance. This suggests that a lack of, as well as an excess of

autonomous actions by middle-managers can result in negative performance outcomes. Similarly, the participation of broader audiences in strategic decisions potentially can have negative consequences for organizational performance in the context of the dynamic environment. The increase in political activities (Narayanan and Fahey, 1982) slows down decision-making and require employing additional resources (Andersen, 2004) that lead to a less adaptive strategy (Collier et al., 2004).

In order to yield the benefits of managerial involvement in strategy-making, scholars point out the need for top-managers to create a forum where relevant actors (not exclusively middle-managers) can engage in reflexive conversation that further the strategic thinking of middle-managers beyond operational concerns (Thakur, 1998). Moreover, when the strategic planning process is perceived as enabling rather than coercive, there is evidence of the positive relationships between strategic planning and organizational innovativeness (Song et al., 2015). Authors emphasize that increases in managerial risk-taking and knowledge-based reward systems, the importance of which is prevalent in dynamic environments, help to balance trade-offs between organizational innovativeness and financial performance. Therefore, the reciprocal relationship between higher and lower-level management has great importance for inclusive strategy-making (Mantere, 2005). Participative and autonomous behaviour help organizations to create novel and unconventional solutions, which can change the existing approach to strategy-making.

In order to reap the benefits that greater participation can bring to the strategy process, like an improved understanding of strategy, more knowledgeable and informative decision-making, and greater commitment of involved actors, it is necessary to consider the additional requirements it necessitates, such as extra resources, increased politicking and the complications of managing a more inclusive strategic process. Although greater involvement can foster strategy-making innovativeness, involvement on its own will not encourage new ideas and changes unless there is a coordination process in place which helps to stream greater collaboration into innovative outcome (Grant, 2003).

2.2 Strategy-making as a bundle of organizational practices

The strategy-as-practice (SaP) perspective arisen in response to the perceived deficiencies within the strategy process research stream to capture micro-level

dynamics (Johnson et al., 2003). A wider practice turn in social theory, with the interest in broader societal practices, activities of social actors and actors themselves taking centre stage gave a further impetus to SaP research (Whittington, 2006; Vaara and Whittington, 2012)[5]. SaP scholars define strategy as "a socially accomplished, situated activity arising from the actions and interactions of multiple level actors" (Jarzabkowski, 2005, p.6). A practice perspective of strategy-making therefore looks at "the ways in which actors are enabled by organizational and wider social practices in their decisions and actions" (Vaara and Whittington, 2012, p.286).

The first notion of SaP was proposed by Richard Whittington in 1996, where he called for attention to the activities of people involved in strategy-making and therefore emphasized managerial rather than organizational competencies (Whittington, 1996). According to Whittington (1996), greater focus needed to be given to the strategizing activities, rather than strategy itself. Whittington' call to arms inspired a new wave of research that was consolidated in a special issue of the *Journal of Management Studies* dedicated to the activity-based view of strategy. In this special issue, Johnson et al. (2003) suggested that the shift towards transparency in resource markets, and increasing demand for innovation, required broader and frequent involvement of organizational actors. They argued that with the decreasing uniqueness of organizational competitive advantages, value resided in the micro-practices of managers, requiring an understanding of the micro rather than meso- or macro-level. This interest in the "human" part of strategizing required new insights to be developed using social rather than economic theory, using the likes of Foucault, Giddens, Bourdieu and Wittgenstein, as well as narrative and critical perspectives to develop new understandings (Seidl and Whittington, 2014).

A common misconception is that SaP is a subfield of the strategy process stream, however the practice and process streams are distinct. Whittington (2007) argues that SaP is less focused on the organization and organizational change but gives equal attention to people, practices and societies that constitute those organizations and change. He continues to suggest that process research still sees strategy as something that organizations *have* rather than what people *do*. Similarly, the practice perspective adopts a broader conception of performance that extends past simply

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[5] The three themes central to the SaP tradition are: practice, praxis and practitioners (Whittington, 2006; Vaara and Whittington, 2012).

economic outcomes (Vaara and Whittington, 2012), also considering how strategists perform their roles (Mantere, 2008); the skills required for strategizing (Whittington et al., 2006); and the wider adoption of practices within societal fields (Jarzabkowski, 2003) as potential outcomes of strategizing activities. A further difference between the strategy practice and process literatures is that the focus of SaP researchers is not limited to the higher or middle-level managers, as is the case in the bulk of the strategic management literature. In this way, SaP pays attention to the various actors involved in the strategizing process, such as strategy teams (Regner, 2003; Paroutis and Pettigrew, 2007), front-line employees (Balogun et al., 2015), consultants (Knight et al., 2018) and other organizational actors who are not conventionally seen as strategists. For example, reinsurers (Jarzabkowski et al., 2015) or brokers and underwriters (Smets et al., 2015). Strategy practice research has also explored broader contexts, moving beyond a focus on for-profit commercial organizations, investigating organizations such as orchestras (Maitlis and Lawrence, 2003), universities (Jarzabkowski and Sillince, 2007; Spee and Jarzabkowski, 2011; Spee and Jarzabkowski, 2017), museums (Balogun et al., 2015) and hospitals (Lusiani and Langley, 2019). Finally, SaP studies – in light of the need to explore the micro-level dynamics – adopted slightly different methodologies. The great emphasis placed on the value of ethnographic approach to achieve immersion in the field (e.g. Samra-Fredericks, 2003; Jarzabkowski et al., 2013; Smets et al., 2015). While attention to the practices of strategy practitioner that often performed through the text and talk (Spee and Jarzabkowski, 2011) called for discourse (Balogun et al., 2014), narrative (Fenton and Langley, 2011) or rhetoric (Sillince et al., 2012) analysis.

By focusing on the micro-practices involved in strategy-making, SaP research aims to reconcile the shortcomings of the strategy content and process research streams. Zooming-in on micro-practices helps to understand how the broader organizational processes are enacted, but at the same time, such a focus does not preclude capturing the strategic content (Johnson et al., 2003).

The following chapters will explore the use of various strategic practices in the daily work of strategy practitioners, specifically focusing on discursive and material practices. Further, the role of the practitioners and in particular strategy professionals will be discussed. Finally, the changes and adaptation of strategy-making practices will be reviewed, leading to the acknowledgement of the need for greater openness in strategizing.

2.2.1 Importance of discursive and material practices in strategy-making

In SaP literature, the term practice means the routinized, shared behaviour and tools used in strategizing work (Whittington, 2006; Vaara and Whittington, 2012). Hence, strategic practices can be organization-specific and guide strategy activity in a particular organization, through strategic episodes (Maitlis and Lawrence, 2003), discursive practices (Vaara et al., 2004; Laine and Vaara, 2007), linguistic practices (Samra-Fredericks, 2003), the use of particular tools (Jarzabkowski et al., 2015), knowledge management practices (Neeley and Leonardi, 2018) or practices of coping with organizational paradoxes (Jarzabkowski and Lê, 2017). Strategic practices can also be cross-organizational and employed broadly by multiple companies; for example, strategic planning (Spee and Jarzabkowski, 2011), strategy workshops (Hendry and Seidl, 2003; Hodgkinson et al., 2006; Johnson, 2008; Johnson et al., 2010), strategy meetings (Jarzabkowski and Seidl, 2008; Wenzel and Koch, 2018), use of PowerPoint presentations (Kaplan, 2011; Knight et al., 2018) and/or open strategizing (Hautz et al., 2017; Whittington, 2019).

The focus of SaP on various organizational practices brought to the attention of scholars the role of communication and language in strategy-making, which is not surprising considering strategy activities often take the form of written or spoken words (Spee and Jarzabkowski, 2011). This stream of research considers strategy as constituting of multiple discourses produced by various organizational actors that are often contradictory and therefore evoke contestation (Kaplan, 2008). Such contestation of meanings creates initial ambiguity that consequently triggers multiple interpretations that ultimately lead to a better-defined strategy (Balogun et al., 2014). As such, managers utilize different discursive and rhetoric practices to convey their vision of the strategic situation and persuade others in the salience of such vision. For instance, Vaara et al. (2004) provided insights into discursive practices of managers that problematize, justify and naturalize the need for entering an airline alliance as a legitimate strategic action. Similarly, Laine and Vaara (2007) demonstrated the creation of an alternative to top management discourses as a resistance to the dominant strategy evoked by top-managers. Finally, Sillince and Mueller (2007) revealed how discursive practices are used to negotiate and frame responsibilities within the strategizing process between the top and middle-level managers.

Besides its focus on discourse(s), the SaP literature pays great attention to various rhetorical practices that influence the strategizing process. For instance,

Samra-Fredericks (2004) demonstrated how top managers skilfully integrated emotional and rational rhetorical devices to influence strategy processes. Jarzabkowski and Sillince (2007) demonstrated how top managers used various rhetorical practices to influence employees' commitment to the multiple, and to some degree contradictory, strategic goals. Similarly, Sillince et al. (2012) identified six rhetorical practices of managers and academics that facilitated and constrained strategic actions for the implementation of internationalization strategy within a business school. While storytelling can also be a powerful tool in facilitating strategic transformation. Dalpiaz and Di Stefano (2018) demonstrated how through several narrative practices, strategy-makers reconciled the tension between familiarity and novelty of strategic change.

The focus on rhetorical and discursive practices within SaP research recently evoked greater attention to strategic concepts - "linguistic expressions, essentially words or phrases with established and at least partly shared meanings which play a central role in an organization's strategy discourse" (Jalonen et al., 2018, p.2795). Strategic concepts are usually created in response to the general strategy of the organization but interpreted differently by organizational actors or groups of actors in different contexts, such as different organizational BUs or at different organizational levels (Seidl, 2007). The meaning of a strategic concept is fluid and depends on how practitioners employ it in a particular organizational context (Paroutis and Heracleous, 2013). In this way, the ambiguity of strategic concepts permits sense-making amongst actors involved in strategic conversations, consequently shaping a meaning that constitutes organizational strategy (Jalonen et al., 2018). Therefore, strategic concepts are crucial building blocks of discursive and rhetorical practices for managers and other organizational actors.

Nevertheless, strategic discourse does not solely involve talk or a text. Balogun et al., (2014) emphasize the importance of discourse contextualization by organizational actors. They need to identify the right time, channels and forms of communication, as well as ensuring it is suitable to a particular sociocultural system by drawing on or emphasizing certain symbolic elements (Rouleau and Balogun, 2011). The combination of discursive practices with other elements of communication has also been recognized in more recent studies: the continuous iteration between strategic text and talk was highlighted in the strategic planning process (Spee and Jarzabkowski, 2011), in the realization of a global strategy in a local context (Arnaud

et al., 2016) and in the production of PowerPoint presentations as a part of a strategic discourse (Kaplan, 2011). Wenzel and Koch (2018) went further by demonstrating how discursive practices are reinforced with bodily movements during keynote strategic speeches, to facilitate the conception of organizational strategy to the audience and signal its novel or familiar elements. In a similar vein, Knight et al. (2018) demonstrated how visual mechanisms used in PowerPoint presentations facilitate strategic conversation and allow participants to communicate and comprehend complex strategic issues. Consequently, the strategic sense-making process is afforded through the complex interrelation of multiple discursive practices. Together, these studies demonstrate that the use of multimodal forms of discourses can enable stronger persuasion effects on the audience.

Through paying greater attention to communicative practices in SaP research, scholars also revealed the importance of sociomaterial objects that strategists used in their daily work. For example, strategy tools provide a common language for actors who maintain diverse functional, hierarchical or geographical positions, as well as creating space for social interaction between these actors (Jarzabkowski and Kaplan, 2015). Tools like SWOT analysis[6] or the BCG (Boston Consulting Group) matrix[7] are widespread among contemporary organizations, facilitating knowledge integration and shared understanding of strategy, which may extend beyond the boundaries of the organization (Spee and Jarzabkowski, 2009; Jarratt and Stiles, 2010). Whittington et al. (2006) demonstrated how strategists could in fact craft material artefacts as a symbolic representation of strategic conceptions and changes, whilst Jarzabkowski et al. (2015) – extending past the notion of tools – focused on the use of material spaces and bodily activities in strategic work of reinsurance managers. The authors concluded that managers create mutual, private and negotiating space in which they use different material objects and bodily postures to accomplish their work. This stream of work also identifies how the use of material objects and tools not only facilitate the strategic discourse, but can also blur the line between strategy formulation and implementation (Leonardi, 2015; Friesl et al., 2017).

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[6] SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis is a tool commonly used by strategy professionals or managers for identification of internal and external factors that help to evaluatehe strategic position of an organization.
[7] A tool developed by Boston Consulting Group. 2*2 matrix depicts relative market share and industry growth rate for each business unit or product line. Commonly used by professional strategists and mangers to evaluate the potential of business portfolio and to suggest investment strategies.

Another critical aspect of strategic discursive and material practices is the ability to enable and constrain the participation of various actors in the strategizing process. Although Whittington (2015) emphasized the use of mass-produced artefacts such as laptops, clipboards, PowerPoint and Excel software as a means for greater participation, there is evidence of how certain discursive and material practices can hurdle participation. Mantere and Vaara (2008) argue that strategy discourses which imply the exclusive participation of senior management and use of specific practices for strategy formulation often cannot be questioned, making it problematic for the participation of other organizational actors. While discourses entailing an open dialogue between actors from various organizational levels, defining clear strategic objectives and explaining connection between those objectives and organizational operations prompt greater participation. Kaplan's work (2011) demonstrated how the use of PowerPoint simultaneously enables the inclusion and exclusion of actors and their voices in knowledge creation and information sharing in the context of strategy-making. Similarly, Spee and Jarzabkowski (2009) argued that strategic tools can define semantic and pragmatic boundaries of participation; the tool selection will influence the information structure, defining the power of some actors and the level of participation of others. Hence, discursive as well as socio-material practices entail power dynamics among involved actors (Hardy and Thomas, 2014).

By paying attention to organizational discourses and material tools, SaP research provides valuable insights not only into how strategizing unfolds in an organization and the valuable role of strategic discourse within this process, but also shows discourse as a valuable strategic resource (Hardy et al., 2000). Discursive and material tools can be both facilitators and hindrances to actors' participation within strategy-making, with the capacity to either enable or disable their role within the strategy-making process (Mantere, 2005).

2.2.2 The role of strategy practitioners and their professional skills

Strategy practice research defines strategy practitioners as "actors who shape the construction of practice through who they are, how they act and what resources they draw upon" (Jarzabkowski et al., 2007, p. 11), suggesting that the enactment of strategic practices is impossible without practitioners. SaP research recognizes a broad set of actors perform strategic practices or influence its praxis, including those directly involved in strategy-making such as managers and consultants, as well

aggregated actors outside of organization such as policy-making bodies, business schools and media (Jarzabkowski and Whittington, 2008; Jarzabkowski and Spee, 2009).

With greater attention to strategy practitioners came recognition of the roles of strategy professionals such as corporate strategists, strategy consultants (Whittington, 2019) and internal strategy consultants (Bernholz and Teng, 2015). Such a view diverges from that held in the conventional strategic management literature, which portrays strategy professionals as individuals who are mainly concerned with strategic planning and the future of the organization as a whole (Mintzberg, 1994, p.31). The presence of dedicated strategy professionals is now commonplace for large corporations, who often establish strategy departments or strategic groups operating centrally or at the periphery of an organization (e.g. Regner, 2003; Paroutis and Pettigrew, 2007). Whilst the role of corporate strategists was traditionally concerned with the performance of strategic planning, analysis and forecasting (Whittington et al., 2017), the non-academic literature has more recently come to recognize strategists as analysts of the industrial and competitive landscape; visionaries of the emerging opportunities; drivers of mergers and acquisitions (M&A) and divestments; developers of strategic capabilities; drivers of special projects; and individuals responsible for corporate portfolios, resource allocation and long-term strategy definition (Birshan et al., 2014).

Although the academic literature is less concerned with the roles of corporate strategists and predominantly pays attention to managers at different levels of an organization, it does recognize the importance of actor skilfulness in strategy-making: practice enactment implies the need for a particular body of knowledge and institutional coherence (Jarzabkowski, 2003; Jarzabkowski, 2008; Vaara and Whittington, 2012). The SaP literature emphasises the salience of competences like framing (Dutton et al., 2001; Miller et al., 2008), the use of discursive and rhetorical practices (Vaara et al., 2004; Jarzabkowski and Sillince, 2007; Mantere and Vaara, 2008; Sillince et al., 2012), use and selection of strategic tools (Spee and Jarzabkowski, 2009; Jarzabkowski and Kaplan, 2015), use of bodily movements (Jarzabkowski et al., 2015; Wenzel and Koch, 2018) and visualization (Knight et al., 2018). For instance, Mirabeau and Maguire (2014) demonstrated the importance of managerial communication skills in fostering autonomous initiatives towards realized strategy. The authors identified that mobilizing wider support for an initiative,

manipulating strategic context and altering strategic context are the three activities successfully accomplished, which affords the transition of strategy from emergent towards realized. Specifically, they underline the importance of discursive skills and the use of symbolic materials by managers in accomplishing these activities. Similarly, it has been found that the understanding of the epistemic culture within a particular context is essential (Swidler, 1986). Kaplan (2011), for example, demonstrated the pervasiveness of PowerPoint presentations in the process of strategy development. She specifically emphasized how certain technologies become embedded in the epistemic culture of knowledge production and hence the importance of skilful use of these technologies in the strategy-making process. Therefore, the skill in use of PowerPoint becomes essentially an enabling condition for participation in strategy-making, where lack of skill precluded actors from the activity. Similarly, Rouleau and Balogun (2011) emphasized how knowledge of the local context such as stakeholder agendas, use of known protocols and rules, identification of right formats and channels for communication, as well as an understanding of internal history, plays a central role in the successful development of strategic conversation by middle-level managers. In the same way, the knowledge and specific use of organizational rituals can facilitate the creation of shared commitment and motivation towards strategic goals (Johnson et al., 2010).

Whittington (2007) recognizes the importance of the strategy profession as an institutional field, which implies professional boundaries and standards. On top of the aforementioned skills relevant to practitioners involved in strategizing, strategy profession often require more specific professional knowledge like business and finance qualifications, or MBA education (Whittington, 2019). Together, the increasing pervasiveness of consultancy agencies and managerial educations has prompted the emergence and adoption of numerous strategic tools and methodologies like the BCG matrix, SWOT analysis, and Porter's Five Forces (Porter, 1985). Professional strategists therefore have to understand and be able to use and adapt these tools to the context of their daily work (Jarratt and Stiles, 2010).

On top of understanding the professional and internal epistemic culture, authors have emphasized the importance of identifying and integrating cultural repertoires from the external environment. For instance, Rindova et al. (2011) demonstrate how the Alessi company rejuvenated its strategy by the integration of new cultural repertoires from art, craft, anthropology and psychoanalysis registers. The integration

of novel concepts allowed the organization to reconsider the nature of products and their usage, allowing them to pursue new opportunities in the market. Similarly, Harrison and Corley (2011) showed how the cultural resources of a climbing gear producer were continuously enriched through the ongoing process of culture cultivation. By engaging with an external group of enthusiast climbers, the firm could harness new cultural resources that allowed them to generate greater organizational authenticity. These studies imply that skilful selection, integration and recombination of cultural resources are important for strategy longevity and therefore for the competences of strategy-makers.

To be able to perform various strategic practices, practitioners have to obtain certain professional knowledge and skills, as well as become familiar with the contextualized use of strategic practices in a particular organization. It is for these reasons that the SaP literature assumes the importance of strategy practitioners' skilfulness. However, although the SaP literature recognizes the role of strategy practitioners in general, it pays limited attention to professional strategists, who remain an integral part of many strategy-making processes through their participation in strategic planning (Whittington et al., 2017) or enactment or other organizational roles (Whittington, 2019).

2.2.3 The changes and adaptation of strategy-making practices on the institutional and organizational levels

Strategizing practices within an organization can have a recursive and adaptive nature (Jarzabkowski, 2003). Recursiveness refers to the routinized and socially accepted (in an organization or a broader society) type of activities, whilst adaptiveness implies the possibility of a change in the idiosyncratic context of practice use. The former provides stability, while the latter allows for changes in strategizing. In this guise, practices occur in macro and micro-social contexts that provide the opportunity for adaptiveness, implying that change might occur not only at the level of idiosyncratic context of a particular organization where the practice is implemented (action realm), but also at the macro-level triggered by broader institutional and regulatory shifts (institution realm) (Jarzabkowski, 2008).

SaP scholars identified several trends that shape macro-level strategy-making practice over the last decade. From an organizational perspective, the increased international scope of corporations has challenged the benefits of centralized strategic

planning (Grant, 2003), while the increased risk of takeovers and rise of an ecosystem perspective have stimulated more transparent communications about the business potential (Gegenhuber and Dobusch, 2017; Yakis-Douglas et al., 2017). Cultural shifts in the popularity of managerial education (Pfeffer and Fong, 2002) have provided organizational actors with competences facilitating their ability to participate in strategic conversations, and therefore increased accessibility of strategy process for various organizational actors (Collier et al., 2004). Similar societal shifts have occurred, with greater demand for transparency and increased professional mobility making strategy externally less opaque (Denis et al., 2006). Finally, the ubiquity of information technologies has enabled multiple voices to be included in the strategic discussions (Kaplan, 2011; Whittington, 2015). Technological changes of this sort are particularly pertinent for large organizations that have multiple offices located across a variety of countries, for whom physical face-to-face collaboration leads to massive expenses. In this way, Whittington et al. (2011) persuasively argue that those trends fundamentally alter the nature of the strategy work toward more inclusive and transparent. Openness in strategy can therefore be as a macro-level shift in practice (Jarzabkowski, 2008) similar to previous shifts towards strategic planning and strategic management (Whittington, 2019).

Despite these advances in understanding, the literature to date offers only limited insights as to how macro-level shifts in strategic practices influence the adaptation of micro-practices in the organizational context, with investigations predominantly exploring strategic planning. Strategic planning is a "more or less formalized, periodic process that provides a structured approach to strategy formulation, implementation, and control" (Wolf and Floyd, 2017, p.1758). Despite predictions of the extinction of strategic planning in organizations (Mintzberg, 1994) this process continues to be extensively used by large organizations (Grant, 2003; Whittington and Cailluet, 2008). Yet, environmental uncertainties, triggered by the development of new technologies and increased competition (Selsky et al., 2007), hinder long-term predictions and therefore require alteration of strategic planning. For instance, Grant (2003) demonstrated that strategic planning has begun to use shorter periods for analysis, moving away from detailed planning towards the identification of a broader strategic direction. In addition, strategic planning became more decentralized and less formal with increased emphasis on performance planning. Ocasio and Joseph (2008) emphasized a strong link between the vocabulary and practices of strategic planning,

and a CEO's leadership, which suggests that strategic planning must be adjusted to the strategic agenda and leadership style. Similarly, in their conceptual study, Ramírez and Selsky (2016) argue that turbulent environments necessitate alternative approaches to strategic planning, using new techniques and methods in order to effectively manage the strategy-making process. A particular emphasis by the authors was on the importance of scenario planning as a technique that can be effectively used in strategic planning. Amrollahi and Rowlands (2018) have also made suggestions for how to design more open strategic planning system.

In line with trends in academia, the professional literature repeatedly emphasizes the need for the new approaches to the strategizing process. The leading strategy consulting companies such as McKinsey and BCG argue that annual strategic planning cannot match the pace of nowadays dynamic environment (Smit, 2018; Reeves et al., 2018). Rather, they suggest a more flexible and dynamic approach to strategic planning through targeted involvement of relevant stakeholders in strategic conversations, rather than decision-making, to identify and address the most critical strategic issues (Dye and Sibony, 2007; Bradley et al., 2018). There has also been recognition of the value of story-telling in the planning process (Shaw et al., 1998) as well as the use of crowdsourcing activities to make strategic planning more open and inclusive (Gasti and Zanin, 2012).

Although SaP research does not clearly identify changes in strategic planning practices, it provides an alternative view of planning not only as a systematic and rational activity that contributes goals identification, budget allocation and definition of performance expectations (Wolf and Floyd, 2017) but as a coordination (Jarzabkowski and Balogun, 2009) and communication tool (Spee and Jarzabkowski, 2011). Strategic planning affords the creation of a shared understanding and agreement among participants of the process (Spee and Jarzabkowski, 2017), leading SaP scholars to underline the communicative nature of strategic planning, which involves multiple actors contributing to the dynamic formation of a strategic plan through ongoing interactions. A strategic plan is not a static document imposing clear objectives; rather, it is a practice that enables interactions between actors and integration of different ideas, plans and visions as conveyed by the actors involved (Ketokivi and Castañer, 2004; Spee and Jarzabkowski, 2011), aligning strategic planning with more inclusive views of the strategy-making process.

The literature provides clear evidence for the shift in the praxis of strategic planning and its general perception, to becoming a more open and inclusive practice, as triggered by the four environmental shifts discussed previously (organizational, cultural, societal, technological) (Whittington et al., 2011). Yet, Whittington (2019) argue that the changes in dominant practices do not eliminate the use of older practices but requires the integration of both into a holistic strategizing process. Further research should therefore explain how the tendency towards greater openness is realized in the context of the strategizing process which is dominated by more traditional and therefore less open practices.

The literature is clear that strategy practitioners require a particular skill set and a variety of tools to enact novel strategic practices. Nevertheless, we know little about how these strategists interpret and respond to changes in dominant practices through the utilization of new tools and the development of additional skills (Whittington et al., 2011). The limited research on strategy professionals has demonstrated that throughout several decades of strategic planning paradigm, analytical and forecasting skills appear to have dominated the characteristics of the strategist profession (Whittington et al., 2017). However, given the more communicative nature of strategic planning recognized by SaP scholars, together with general trends for openness in strategizing, there is an apparent need for other skills and competences in the use of tools by strategy practitioners.

2.3 Open strategizing and use of online communities

With strategy being increasingly conceived as a socially accomplished practice, and trends towards greater transparency and inclusion in strategy practices, open strategy emerged as a new phenomenon of interest. Open strategy implies the involvement of multiple actors (internal and/or external) into the strategizing process and greater transparency about the strategic rationale available to them (Whittington et al., 2011). Although process studies recognized the distributed nature of strategy formulation, particularly the salient role of middle-management involvement in strategy-making (Wooldridge and Floyd, 1990), it paid less attention to those micro-level practices that facilitate such inclusion. SaP research acknowledged the importance of, and built upon the notion of, a broader set of strategy practitioners (Whittington, 2006) by focusing on the use of various practices and tools that afforded inclusion in day-to-day activities of

strategy-making (Mantere and Vaara, 2008; Kaplan, 2011). The open strategy literature builds on the line of development established by SaP research by paying attention to the micro-practices that enable inclusion and elicit greater transparency of strategy-making, but also exploring what hindrances these practices may bring. In this way, open strategy scholars recognize the distinction between the traditional approach to strategy-making and inclusive strategizing characterized by peer production, crowd-based input and collective buy-in and action (Birkinshaw 2017, p.424).

Recognition of the importance of strategic openness amongst scholars grew significantly about a decade ago, with the likes of Doz and Kosonen (2008) emphasizing that strategic sensitivity was a vital element of strategic agility. They argued that strategic sensitivity can be achieved through a more open and inclusive strategy-making process, with more accessible and intense dialogues about strategic issues. Similarly, Chesbrough and Appleyard (2007, p.58) described open strategy as "balancing the tenets of traditional business strategy with the promise of open innovation". In their eyes, open strategy had the ability to enhance value creation by harnessing knowledge from a broader variety of sources, as well as capture value through the realization of these identified ideas in an open way. Although open innovation and strategy share some similar challenges – such as the attraction and mobilization of participants and coordination issues (Chesbrough and Appleyard, 2007) – open strategy has a number of distinctions. According to Dobusch et al. (2017, p.6) openness can be understood through the expansion of communication process regarding three different dimensions: actors, topics and purposes. Dobusch and colleagues compared these three dimensions using the concepts of sociality, factuality and temporality of communication; sociality implies the variety of actors that are considered relevant for a particular communication process. Open strategy, in contrast to open innovation, less frequently includes external participants, perhaps as a consequence of the more sensitive nature of strategic conversation (Hautz et al., 2017). Factuality refers to the themes that are considered to be relevant for the communication process. Hence, open strategy is not limited to considering technological issues and knowledge-sharing, but also concerned with the opinions, ideas and interpretations of participants on various sets of issues (Seidl and Werle, 2018). Finally, temporality refers to the ability to integrate the references to past, present and future events within a communication process. Here, open strategy deals with bundles of interrelated strategic issues arising from unpredictable and turbulent

environments (Selsky et al., 2007) rather than with more clearly defined technological challenges often addressed in open innovation. Overall, open strategy considers a broader range of communication actors, topics and purposes that often leads to the perception of open innovation as a subset of open strategy research (Whittington et al., 2011).

The affordances provided by information technologies (Morton et al., 2019) and particularly by social media (Leonardi and Vaast, 2017) provides further impetus for research on open strategizing. Social media usage is almost ubiquitous amongst contemporary organizations, who often leverage forms of social media such as social networking platforms, online communities and blogs for open strategizing initiatives (Baptista et al., 2017). These online collaborations tools can broadly be distinguished as either crowdsourcing or online community-based platforms (Baptista, 2017; Dobusch and Kapeller, 2018). Crowdsourcing platforms are suitable for one-off problem-solving exercises characterized by well-defined problem statement, collaboration principles, evaluation and selection criteria (Aten and Thomas, 2016; Bonabeau, 2009; Hutter et al., 2017; Malhotra et al., 2017; Stieger et al., 2012) where members participate independently. Hence the use of such tools is similar to crowdsourcing for innovation contests (Afuah and Tucci, 2012). In comparison, open strategizing using online community-based platforms implies interactions between participants with shared goals or identities to share knowledge (Faraj et al., 2011), communicate strategic vision, or to help develop a shared understanding of strategy (Baptista et al., 2017; Boudreau and Lakhani, 2013; Dobusch and Kapeller, 2018). Online community-based platforms therefore involve aggregating a large number of diverse contributions into a value-creating whole.

The choice of open practices is driven by the type of issues that the organization seeks to address through open strategizing. For instance, maintaining a greater focus on a particular strategic challenge with a clear problem statement might require limited participation of actors knowledgeable in a particular area (Hutter et al., 2017). In comparison, the creation of shared understanding and identification of strategic issues might require intense collaboration amongst the actors involved, to ensure their interpretations are fully articulated (Baptista et al., 2017). Some organizations take open strategy to an extreme, and use it as a fundamental approach to organizing processes within the organization, not exclusive to strategy-making (Luedicke et al., 2017; Dobusch and Kapeller, 2018). Consequently, the use of appropriate practices

will be guided by the objectives that a particular organization pursues. To this end, open strategy research holds great potential to offer insights into how organizations can use this inclusivity in strategy-making for their own benefits, as well as identifying what obstacles may hinder such a process.

2.3.1 Utilization of more inclusive and transparent approaches to strategy-making in organization

Extant research on open strategy strongly suggests that this novel strategic practice possesses the potential to improve the strategy-making process in organizations. For instance, the increased provision of information about the roles of various actors in fulfilling organizational strategic objectives can increase strategically aligned behaviour and therefore enhance strategy implementation (Van Riel et al., 2009). Similarly, Stieger et al. (2012) recognized that the inclusion of organizational actors in strategic problem-solving can energize employees by providing them with a voice; facilitate recognition of talents or experts in a particular problem area; enhance networking among employees; and identify organizational issues that are shared from bottom-up. Furthermore, the involvement of organizational actors in the strategizing process increases their sense of community (Hutter et al., 2017) and can enhance their commitment to the collaboratively developed strategies (Hautz et al., 2017) which has positive effects for strategy implementation.

In addition to benefits associated with greater identification with, and commitment to, strategy, open strategy encourages better quality of strategic decision-making (Bonabeau, 2009; Stieger et al., 2012; Hautz et al., 2017). The involvement of participants with diverse knowledge and areas of expertise can be used to address and solve complex challenges produced by dynamic environments, or provide different perspectives on existing and potential organizational capabilities (Whittington et al., 2011). More recently, the literature has begun to engage with the notion of inter-organizational open strategizing. Seidl and Werle (2018), for instance, demonstrated how the selection of external collaborators and the initial negotiations about collaboration benefits can influence the consequent dynamics of inter-organizational sense-making. The authors argue that engagement with other organizations in the process of collaborative sense-making facilitates the understanding of meta-problems and enables those organizations to develop better strategic responses to fast-paced environment.

Strategic transparency and inclusion that goes beyond organizational borders provide additional benefits (i.e. external openness). For instance, Yakis-Douglas et al. (2017) demonstrated how in a situation when an organization underwent a strategic change that deviated from industrial norms, use of open strategy resulted in increased trust from investors and greater financial gains. Their study based on a large sample of M&A deals revealed a positive relationship between the voluntary external communications about M&A strategy and share prices. Externally, open strategy can also be used for impression management, and help gain the support of external stakeholders, particularly in the early stages of organizational life (Gegenhuber and Dobusch, 2017). Gegenhuber and Dobusch identified the practices of broadcasting, dialoguing, and including which respectively have an increasing level of external actors' involvement. It is possible that at the earlier stages of organizational development there is a greater need to solicit opinions or insights from external actors, while at more mature stages organizations may wish to limit inclusion and focus on activities of information sharing to shape a particular organizational image. In addition to impression management, stakeholder management can also be performed via open strategizing (Schmitt, 2011). Schmitt demonstrated how a Shell project succeeded in managing socio-political and ecological challenges by employing an open, more inclusive approach to strategizing, co-operating with authorities, local communities and NGOs. Therefore, beyond improving internal processes, open strategizing may also facilitate external legitimacy building (Barros, 2014; Tavakoli et al., 2017).

As discussed in earlier chapters, technology is one of the forces that has fostered open strategizing. It is therefore not surprising that the open practices utilized by various organizations are often technology-enabled (Tavakoli et al., 2017). Taking a deeper look at the use of social media as a technology-enabled participation practice revealed that it can increase organizational reflexivity (Baptista et al., 2017), which can be seen as a form of competitive advantage. Reflexivity involves the continued analysis of organizational strategic actions and integration of feedback from the actors involved in open strategizing, allowing organizations to "create conditions for a strategy to become shared and collectively owned" (Baptista et al., 2017, p. 13). In the same vein, Hutter et al. (2017) argued that participation in open strategizing via a virtual community indirectly and positively influenced the sense of organizational community. The combination of posting, commenting and voting behaviours foster higher intellectual engagement with the discussed topic or issue, which can enhance

the shared understanding of the strategy. Luedicke et al., (2017) argue that the use of e-mailing list for open strategizing can be beneficial through the creation of collective and shared identity, increased legitimacy of decisions achieved through collective decision-making, and continue to motivate actors to participate in open strategizing. On top of the benefit of shared understanding, open strategy can lead to increased commitment and identification with the organization, and enhanced quality of decision-making, sense-making of environmental changes, and strategy understanding, as well as affording the development of new organizational capabilities.

Scholars argue that despite the benefits associated with open strategy, it is a dynamic phenomenon, and thus the level of openness, number of actors involved and their roles are not fixed, but can change over the lifetime of a project or organization. Appleyard and Chesbrough, (2017) propose that the level of openness depends on organizational priorities at a certain period of time: a more open strategy is suitable when an organization aims to grow and is concentrated on collaborative value creation, while a less open strategy might help in seizing value created in an open way. Similarly, there is a fluctuation in levels of participation and inclusivity in open strategizing depending on the level of centralization (Mack and Szulanski, 2017). These authors define participation as the accessibility of the strategy process to an increasing number of participants, while inclusivity refers to connectedness between actors and the use of such connections for strategic issues resolution. Centralized organizations tend to use both types of practices in their strategy formulation processes, while decentralized organizations tend to use inclusive practices only.

Open strategizing therefore offers a number of benefits for the organizations implementing it. Whilst open strategy scholars recognize the nuanced nature of open practices by acknowledging contextual factors that create a more favourable environment for successful use of open practices, there are also a set of underlying tensions that accompany open strategy and have to be carefully considered by the managers responsible for its implementation.

2.3.2 Underlying tensions of open strategizing and challenges of its implementation

Despite the identified advantages that can come from utilizing open strategizing within an organization, a number of underlying tensions are associated with such approaches. Similar to prior discussions regarding the inclusion of middle-level

managers in the strategy process, the diversity of expertise of collaborating actors can lead to the risk of conflict or self-promotion behaviour (Malhotra et al., 2017). The knowledge gaps between participants may arise from differentiated levels and areas of expertise, creating the potential for disagreement and offensive behaviour. Additionally, self-promotion behaviour is related to ignoring the ideas of others, subsequently downgrading the value of participation. While the former can decrease the willingness to engage in open discussions, the latter can corrupt the idea of "involvement" altogether. Similarly, when ranking or evaluating ideas there is a risk of biased assessment: Reitzig and Sorenson (2013) study on the in-group bias of idea evaluation found that ideas proposed by individuals from one business unit are often judged more favourably by individuals from the same business unit, in comparison with "outsiders".

Hautz et al. (2017) identified another set of dilemmas that emerge from a more inclusive and collaborative approach to strategizing. They found that the process of tapping into a broader pool of knowledge makes the decision-making process slower and less controlled, and whilst the involvement of various actors in strategy increases their commitment, it also creates the risk of further non-involvement of participants whose ideas were not implemented. Similarly, unconventional and creative ideas coming from the outside organization comes with the trade-off of sensitive information exposure, whilst the engagement of non-strategy professionals increases their burden by adding jobs to their pre-existing workload. Another challenge of open strategizing is establishing the balance of participation and collaboration. Generally, participation in online communities in the context of open strategy is manifested in different behaviours, such as the submission of ideas, commenting and evaluating (Hutter et al., 2017). While commenting and evaluation demonstrate a higher level of engagement and can increase the sense of virtual community, submission of ideas alone has a contrary effect. Therefore, solely submitting ideas without engaging with the ideas of others can in fact be counterproductive. Studies on social media usage emphasize that the effects of openness in organizations are complex and involve multiple risks that require consideration when designing open practice tools and developing mechanisms of collaboration (Bonabeau, 2009; Stieger et al., 2012). In a similar vein, Hutter et al. (2017) argue that characteristics of social media, such as 'ease of use', is an important moderator of employees participation in open strategizing initiatives.

Other tensions arise from the necessity to integrate open practices into the formal strategy-making processes within an organization (Whittington, 2019). Formal strategy-making implies a set of established strategic practices conventionally performed by practitioners. Although the strategic management literature sees strategy process as an inseparable combination of induced and autonomous activities (Burgelman, 1983; Burgelman, 1994; Lovas and Ghoshal, 2000), inclusive strategy-making can be seen as distinct to the formal process of strategy-making. Jarzabkowski and Balogun (2009) argued that the communication and participation in strategy-making on its own does not lead to strategy integration. Hence, if not intrinsically assumed in an organization such as Wikimedia (Dobusch et al., 2017; Dobusch and Kapeller, 2018; Heracleous et al., 2018), Premium Cola (Luedicke et al., 2017), or Linux (Puranam et al., 2014), open strategizing is a new managerial practice that requires legitimation and can be resisted by organizational members (Birkinshaw et al., 2008). This inherent and fundamental divergence between the flexible and inclusive approach of open collaboration and the historically hierarchical and controlled approaches to strategy development posits implementation challenge (Hautz et al., 2017; Heracleous et al., 2018), specifically for more traditional organizations utilizing a closed approach to strategy-making.

As such, the identified tensions and hindrances are heightened by this fundamental difference. Existing research highlights the need for the combination of more open and closed practices, in order to successfully implement open strategizing (Dobusch et al., 2017; Dobusch and Kapeller, 2018; Heracleous et al., 2018; Luedicke et al., 2017). In highly centralized organizations, a mix of inclusive and participatory practices is needed to incorporate the existing practices of exclusive decision-making with the demand for varied inputs from a broader set of actors (Mack and Szulanski, 2017). In the same way, Luedicke et al. (2017) demonstrated how open agenda setting, participation and governance was balanced with centralized agenda setting, selective participation and authoritative decision-making, leading to the highly productive use of open strategizing. The need for a balanced approach was also evident in Dobusch et al. (2017) study on Wikimedia's strategy development. Here, the actors employed higher and lower levels of procedural and content openness interchangeably to bring more focus and achieve their strategy development goals. Less open practices may also be utilized with greater benefit in crowd-based initiatives, while community-based collaboration can benefit from more open practices

(Dobusch and Kapeller, 2018). Additionally, the authors argue that the nature of collaboration can amplify various tensions: more open practices in crowd-based collaboration pose an increased burden on the participants because they require greater engagement from them, whilst community-based collaboration uses more closed practices which can undermine participant commitment.

As the reviewed literature demonstrates, the realization of open strategy practices creates multiple challenges for the managers implementing them. Moreover, implementation of open strategizing, even in inherently open organizational forms, requires a continuous interplay between open and closed practices. It is also notable that the design and collaboration mechanisms used to implement open practices will play an important role in their success.

2.3.3 Governance mechanisms of online community: contradictory demands of flexibility and control

In the context of this study, I treat an online community as one of the possible forms of open strategy implementation. Therefore, the literature on online community provides additional insights that are relevant for the general understanding of openness and its organizing. Building on previous research Fisher (2018, p.281) defines online community as "Internet-based platforms for communication and exchange among individuals and entities with shared interests". The internet-based nature of such communications increases participation by allowing collaboration of individuals from dispersed geographical locations, which is particularly relevant for large organizations with multiple subsidiaries that are located across the world and in various time zones. Hence, online communities provide great potential for open strategizing as they allow for continuous dialogue among organizational members, facilitating discussion and shared ownership of organizational strategy (Baptista et al., 2017). Social media in general, and online communities in particular, can be used for communications with external parties (beyond borders of an organization) and internal parties (within organizational boundaries) (Leonardi et al., 2013). Hence, the existing literature recognizes various affordances that online communities provide.

Online communities make transparent and visible the content of communications (Treem and Leonardi, 2013). As information is published online, it is visible to others, and therefore can be utilized by a larger number of organizational actors. Furthermore,

the content remains recorded and therefore visible over time, allowing community members to review and/or contextualize it within prior discussions, avoiding temporal decoupling (Faraj et al., 2011). Community members can also edit and craft their messages multiple times before making it visible to others, affording a higher degree of control over the communicated content (Treem and Leonardi, 2013) which can secure more purposeful and comprehensive communication. Participation in an online community also facilitates the association between relevant individuals and content (Treem and Leonardi, 2013; Leonardi et al., 2013): communication via online platforms enables organizational actors – who would otherwise not communicate with each other – to identify individuals with relevant expertise, and consequently collaborate with them. Collaboration via online communities also allows for the recombination of ideas (Faraj et al., 2011) as the available online content can be re-integrated with the insights of other participants into novel idea combinations. Finally, an online community has permeable boundaries (Faraj et al., 2011) that enable dynamically demarcated boundaries of participation in community activities, and alleviate the tension of sensitive information exposure (Hautz et al., 2017) through the decision of including internal and/or external participants. Putting the discussed affordances into the context of strategizing provides great potential for organizations to utilize online communities in strategizing work (Haefliger et al., 2011).

The existing research has recognized the great potential for online communities in the creation and dissemination of open innovation (West and Lakhani, 2008); knowledge sharing (Haas et al., 2015; Hwang et al., 2015; Neeley and Leonardi, 2018); culture enhancement (Harrison and Corley, 2011); and legitimacy gaining (Barros, 2014). Although mainly focusing on online communities that cross organizational boundaries, existing research identifies various ways in which organizations can benefit through engaging or orchestrating online communities. Fisher (2018) identified informational, influence and solidarity benefits, where the access to information such as market insights, technological advancements or user innovation can be a valuable asset for strategic decision-making, specifically in high uncertainty environments. The ability to access resources such as funds, knowledge, skills and expertise of the crowd allows organizations to optimize the use of their own resources and create value for its customers and consumers in a way that competitors might not. Finally, the ongoing interactions between organization and community members creates social capital that can consequently be turned into loyalty and trust

towards the products of an organization. Faraj et al. (2011) argue that the dynamism and fluidity of online communities allow barriers for participation to be reduced through inviting individuals who are passionate about the topic of discussion, facilitating the evolution and recombination of ideas, and decreasing stereotyping through ambiguous identities. However, at the same time, this may also prompt disagreement between actors, leading to a conflict that can reduce the willingness to participate, decrease the credibility of the outputs, and decontextualize the ideas as the discussion progresses.

Therefore, when organizations decide to establish internal or/and external communities the question of its coordination becomes central, in order to optimize the benefits of using online communities (O'Mahony and Ferraro, 2007). The way an online community is governed can enable and constrain its members' collaboration, communication, and knowledge sharing (Leonardi and Vaast, 2017) and is, therefore, crucial for maintaining community vitality and achieving its goals (O'Mahony and Ferrero, 2007). Extant literature on community governance considers various activities targeted at the creation and maintenance of community boundaries, participation encouragement, and control over community interactions.

Community boundaries affect the generative capacity of collaboration between community members through balancing the trade-off of openness and control (Jarvenpaa and Lang, 2011). For instance, firm-sponsored communities have a stronger alignment with the goals of a sponsoring firm and therefore lower boundary permeability, which can challenge community growth (West and O'Mahony, 2008). Similarly, targeting selected users and fostering community identity helps to define boundaries, such as using inclusion criteria for community members with a specific set of competences, while discouraging the participation of other potentially valuable actors (Jarvenpaa and Lang, 2011; Reischauer and Mair, 2018). In tandem, defining the level of autonomy and degree of overlap between subcommunities helps to manage the size and membership of the subgroups that communicate with each other, but also requires dedicated community ambassadors overseeing subcommunities' activities (Reischauer and Mair, 2018).

The continuous voluntary participation of online community members is essential for its existence (Preece, 2000), while a membership rate is often considered to be a further success factor (Ransbotham and Kane, 2011; Malinen, 2015). Although Faraj et al. (2011) argue that the dynamism and fluidity of online communities allow barriers

for participation to be reduced, maintaining and prompting participation remains one of the central challenges for community sustainability (Malinen, 2015). Hence, the research emphasizes the importance of anonymous participation (Faraj et al., 2011; Massa, 2016) and rewards to foster engagement of community members (Malinen, 2015; Amichai-Hamburger et al., 2016). However, having an anonymous environment comes at the risk of a decrease in content accountability (Faraj et al., 2011), while reward system design might be difficult to align with the diverse motivations of community members (Malinen, 2015). The diversity and turnover of community participants have a curvilinear effect on collaboration performance, hence both too little and too much diversity and turnover can harm collaboration (Ren et al., 2015; Ransbotham and Kane, 2011). Additionally, online communities often operate with multiple value propositions directed to different stakeholders that also create tensions for community coordination (Barrett et al., 2016).

Finally, although not explicitly, the literature on online communities discusses various activities that refer to the management of community content, doing so as a means to steer members interaction and collaboration. For instance, content monitoring and subsequent sanctioning for inappropriate content help to mitigate the risk of conflict among community members (Reischauer and Mair, 2018; Ren et al., 2007). While adding content and facilitating community discourse, helps to mitigate the risk of information overload and enable greater coherence of discussions (Kane et al., 2013; Majchrzak et al., 2013). Hence, the governance related to the community content is mainly discussed as a mean of conflict mitigation.

The reviewed literature provides enough evidence about the benefits of online community use by organizations and its potential utilization for open strategizing. However, for an online community to remain sustainable and to achieve its goals, the governance and coordination of members' activities become crucial. Community governance requires a balancing act between multiple decisions about its boundaries, participation mobilization and control mechanisms that can influence community design and therefore its dynamics (Ren et al., 2007). Yet, the literature on online communities provides limited insights into managing 'strategic' online communities that might have different demands due to the peculiarities of discussed topics (e.g. sensitivity, perceived exclusivity of strategy), and demands for members' professional expertise (e.g. understanding strategic frameworks, terminology).

2.4 Linking open strategizing and formal process of strategy-making: the issues of bridging and organizing for strategic influence

This study aims to answer two research questions: *1) How do managers bridge open strategizing within online community and formal strategy-making, characterized by closed and hierarchical decision-making?* and *2) How do managers organize an online strategy community to influence strategic decision-making in large organizations?* The following chapter discusses more narrowly the literature on strategy process, practice and open strategy and motivates the relevance of these research questions.

All three reviewed streams of literature acknowledge the dichotomies of various strategizing activities taking place simultaneously within the strategy-making process and the need for their balance. Although open strategy can be seen as induced by top management, it is often perceived as an organizational practice that enables autonomous behaviour more characteristic to emergent strategy. In addition, this approach to strategy-making inherently differs from more conventional and established forms of strategizing (Birkinshaw, 2017) that are usually associated with induced strategic behaviour. The open strategy literature emphasizes the fundamental difference between the flexible and inclusive approach of open collaboration and traditionally hierarchical and controlled approaches to formal strategy development (Heracleous et al., 2018) explicating that these two organizational processes adhere to different organizing logics (Sambamurthy and Zmud, 2000). Subsequently, this implies that the full integration of open strategizing and formal strategy-making is not only difficult to achieve but also may be counterproductive. The very advantage of more inclusive and transparent exchange of ideas for identification and sharing of strategically relevant information (Bonabeau, 2009; Stieger et al., 2012) that can be achieved through the fluid interactions of online community members (Faraj et al., 2011) can be diminished by strong alignment with the much more structured and systematic approach of formal strategizing. Moreover, the use of open practices does not eliminate the use of more traditional and institutionalized closed practices of strategy-making (Whittington, 2019). As such, the efficient co-existence of open strategizing and formal strategy-making will require adherence to sometimes contradictory principles of two organizing logics. Hence the concept of 'bridging', usually utilized in research investigating the context of competing institutional logics (Purdy, 2009; Tracey et al., 2011; Smets et al., 2015), becomes highly relevant for

investigating two processes based on different organizational principles. For instance, Smets and colleagues (2015) demonstrated how members of a reinsurance trading firm operated in the context of competing market and community logics. Specifically, the authors emphasized the mechanism of bridging that enabled reconnection between practices belonging to two distinct logics by "skilfully importing pertinent aspects of one logic into the enactment of another" (p.958). Therefore, the organizations aiming to implement open strategizing practices with the existing closed approaches to strategy-making will face the challenge of bridging between two organizational processes adhering to distinct logics of organizing. The open strategy literature does recognize the potential tensions when integrating a new open practice into the established strategizing process, yet the understanding of such bridging mechanisms will help to explain how these distinct approaches to strategizing can effectively co-exist (Hautz et al., 2017; Whittington, 2019).

The understanding of bridging between two co-existent processes brings forward the issue of open strategy's influence on formal strategy-making. The open strategy literature often assumes the active participation of top or higher-level management with decision-making power in organizing or driving open strategy initiatives (Luedicke et al., 2017; Hutter et al., 2017; Malhotra et al., 2017). There is an implicit inference that strategic insights developed through an open strategy initiative will be taken into consideration, and have an impact on, the strategic decision-making process. From the SaP perspective, such inclusive strategizing is often assumed to be an integral part of strategic episodes such as strategic planning (Jarzabkowski and Balogun, 2009; Spee and Jarzabkowski, 2011; Spee and Jarzabkowski, 2017) or strategic workshops (Whittington et al., 2006; Hodgkinson et al., 2006; Johnson et al., 2010). These practices are therefore *a priori* considered to be strategic and possess strategic influence. Similarly, the focus of SaP studies on alternative types of outcomes such as "competence and credibility of individual practitioners in performing their roles" (Whittington, 2007, p.1583) reduces the emphasis on the links between practice and its influence on organizational strategy. However, the extant strategy process literature acknowledges that strategic influence can be achieved through coupling between the different organizational process (Ocasio, 1997; Ocasio and Joseph, 2005). Ocasio and his co-author argue that the strategy-making process is enacted through the structural patterns of formal and informal procedural and communication channels. Hence, the efficient coupling between various channels will influence the process of strategic

issues recognition and its transfer into the organizational strategic agenda. In line with this assessment, Ocasio (2011) called for further research on understanding the integration between the strategic vision and goals imposed by the top with bottom-up ideas emergent from the periphery of the organization. Therefore, if open strategizing is a communication channel enabling generation of bottom-up ideas, then its coupling with communication channels of formal strategy-making becomes increasingly important for enabling an efficient process of work with strategic issues and strategic influence.

Recently, the strategic management literature has called for more research on the intersection of the ABV and SaP research (Ocasio et al., 2018). While process research, and ABV in particular, paid attention to the administrative structures and strategic context that enable incorporation of autonomous and induced processes (Burgelman, 1983; Ocasio, 1997; Ocasio and Joseph, 2005; Joseph and Ocasio, 2012; Mirabeau and Maguire, 2014), SaP has provided a closer look at the practices constituting these structures and context, with specific emphasis on communicative practices that help to shape meaning between managers (Balogun and Johnson, 2004; Rouleau and Balogun, 2011) or among organizations (Seidl and Werle, 2018). Hence, SaP emphasizes the salience of skilfulness of organizational strategists with various discursive (Vaara et al., 2004; Mantere, 2005; Mantere and Vaara, 2008; Rouleau and Balogun, 2011) and rhetorical practices (Jarzabkowski and Sillince, 2007; Sillince et al., 2012) as well as the use of strategizing tools (Kaplan, 2011; Jarzabkowski and Kaplan, 2015; Knight et al., 2018) for enabling both induced and autonomous behaviour within the organization. For this reason, Ocasio and colleagues (2018) see great potential in the intersection of these research streams and recognizing communication channels not only as structural "pipes and prisms" but rather as communicative practices constituting of various vocabularies, rhetorical tactics and strategic artefacts. They call for attention not only to how strategic issues and ideas emerge within an organization, but rather what are the communicative practices that enable these issues to move through organizational communication channels and reach the strategic agenda of the organization and attention of decision-makers (Ocasio and Joseph, 2018). That aside, the communicative practices are recognized integrative element of strategizing process (Fenton and Langley, 2011), and understanding of bridging between novel open strategizing practices and the established strategy-making process will provide novel insights around communicative

practices relevant for influencing organizational strategy. Studying bridging and the influence of open strategy initiative therefore provides a fruitful context for understanding the intersection of the strategy process, practice and ABV research streams (Ocasio et al., 2018) and affords a combinatory perspective of strategy (Burgelman et al., 2018) through the linking of lower-level practices and higher-level organizational processes (Kouamé and Langley, 2018).

On top of the issues of bridging and influence, the reviewed literature highlights this paradoxical (Smith and Lewis, 2011) need for a simultaneous combination of more open and closed practices for the successful open strategizing (Dobusch et al., 2017; Dobusch and Kapeller, 2018; Heracleous et al., 2018; Luedicke et al., 2017). For example, Hautz et al. (2017) identify the disclosure dilemma that implies the balance between breadth of inclusion and sensitivity of discussed information. Luedicke et al. (2017) demonstrated that highly productive use of open strategizing requires a balance between open agenda setting, participation, and governance as well as more centralized agenda setting, selective participation, and authoritative decision-making. Similarly, Dobusch et al. (2017) demonstrated how higher and lower levels of procedural and content openness have to be interchangeably applied in the case of Wikimedia's strategy development. Furthermore, managing collaboration between actors with varied expertise and functional background increases the need for alignment of interests and reduction of power asymmetries (Miller et al., 2008; Pappas and Wooldridge, 2007) and political contestation (Kaplan, 2008; Narayanan and Fahey, 1982). Hence the procedural arrangements enabling inclusion and exclusion in open strategizing become salient consideration for managers responsible for the implementation of open practices. In addition, the online community literature also provides valuable insights in organizing open collaboration processes through various governance mechanisms. For instance, the permeability of community boundaries (West and O'Mahony, 2008) trigger trade-offs between openness and control, and have an influence on the generative capacity of online collaboration (Jarvenpaa and Lang, 2011). Anonymous participation can mobilize community members (Faraj et al., 2011; Massa, 2016) but at the same time precludes community members from self-identification, which can affect the level of engagement (Hwang et al., 2015). Finally, unlike the open strategy literature, online community scholars discuss the importance of community content control as a governance mechanism; content moderation helps to mitigate the risk of information overload, enable greater coherence of discussions,

and reduce risk of conflict among members (Kane et al., 2013; Majchrzak et al., 2013; Reischauer and Mair, 2018; Ren et al., 2007). Therefore, the organizing of an online community requires careful considerations of its design (Ren et al., 2007) and balancing between levels of inclusion, participant's mobilization, and content control. Further conceptualization of various coordination choices and their interdependencies can provide novel theoretical insights around openness in strategy-making and its organizing.

The reviewed in this chapter literature underlines the issues of bridging, influencing and organizing. These three issues motivate two distinct research questions. First, the issue of bridging is concerned with underlying mechanisms that enable productive co-existence of two organizational processes and hence enable the influence of open strategizing on formal strategy-making. While the issue of organizing an online strategy community focuses on the challenges that practitioners face when implementing an open strategy initiative for strategic impact. Hence, the issue of influence is relevant to both research questions.

Chapter 3. Methodology

The choice of a methodology is guided by ontological and epistemological assumptions of a researcher and these should be a starting point of any research design (Myers, 2013). The philosophical assumptions are crucial for determining how one understands reality and the way the world operates, as well as what constitutes an acceptable way of knowledge creation. Hence, philosophical assumptions will guide the research focus, its development and outputs. Although literature uses various ways to divide groups of philosophical traditions, broadly there are three paradigms based on a set of distinct assumptions about ontology and epistemology, namely: positivism, constructionism and critical realism (ibid, 2013). The constructivism implies that reality is extremely complex as it is determined by people and their experiences, hence it cannot be studied objectively through aggregated numbers and abstracted variables. The knowledge, therefore, can be built through understanding and reconstructing multiple meanings grounded in the context of the research interest (Guba and Lincoln, 1994). Hence, the main objective of the constructivist approach is to identify patterns of subjective meanings rather than one objective truth. This study investigates the organizing of open strategizing within a large corporation as a derivative of social interactions and hence adopts a constructivist paradigm.

The constructivist view is in line with the adoption of the SaP lens that sees strategy as "a socially accomplished, situated activity arising from the actions and interactions of multiple level actors" (Jarzabkowski, 2005, p.6). This understanding of organizational strategy resembles constructivist understanding of reality and hence SaP research extensively utilizes the constructivist epistemologies (Grand et al., 2010). In line with the SaP research agenda, this exploration is focused on the understanding of how open strategy is enacted within a particular hierarchical organization in interaction with other organizational practices by actors. This requires a deeper understanding of the context in which practices occur. Hence, the focus is not solely on organizational practices but also on practitioners utilizing them as well as the praxis that they engage in (Whittington, 2006). The SaP stream of research is much more driven by the phenomenon rather than any particular theoretical position (Whittington, 2007). Further, this study is opted for a flatter ontological approach (Seidl and Whittington, 2014), hence focusing on the more particular aspects of open

strategizing practice and trying to link it with a larger organizational process of strategy-making.

Given that open strategy research is in its earlier stages, the aim was to develop a theory, rather than test some of the existing assumptions and hence the qualitative approach was the most suitable fit (Edmondson and McManus, 2007). Further, the focus on micro-level in strategy practice and process research favours the qualitative approach (Kouamé and Langley, 2018). The qualitative methodology is rather an umbrella term for multiple research practices (such as interviews, observations, notes, photos, videos etc.) that can be used together or separately, that are aimed to understand and explain meanings of events in its natural settings (Myers, 2013). The choice of particular qualitative research practices was done in alignment with the methodological approach that was guided by the research objectives (Gehman et al., 2018). Since the focus of this study was on what people do, how do they interpret the organizational events and their own activities, the inductive approach was the most appropriate (Gioia et al., 2013). This approach allows for flexibility and does not constrain the researcher through the adoption of pre-defined theoretical concepts prior to entering the field, but rather allows the researcher to build theory from the emergent, data-driven concepts. However, it is important to acknowledge that by adopting this approach the researcher becomes central 'instrument' of the knowledge creation process (Myers, 2013).

3.1 Case-study approach as Research Method

To understand the organizing of inclusive and transparent strategy-making practice in the established strategy formulation process an inductive approach was adopted (Glaser and Strauss, 1967), carried through a single case-study design (Yin, 2003) with an ethnographic element (Van Maanen, 1979; Watson, 2011). The study investigates the case of a large telecommunication corporation that implements an online strategy community to afford a more inclusive approach to strategy-making. The method choice was motivated by the main objective to produce new knowledge about open strategy organizing in a specific context of a large for-profit organization that was not done before (Dyer and Wilkins, 1991; Eisenhardt and Graebner, 2007). The extant research on open strategy organizing through online community was mainly investigated in the context of organizations with inherently open nature, such as

Wikimedia (Dobusch et al., 2017; Dobusch and Kapeller, 2018; Heracleous et al., 2018). The case-study approach allows deeper immersion and engagement with theoretical concepts and provides an opportunity to identify and illustrate the relationships between them (Siggelkow, 2007). Further, my secondment to the studied organization for 18-months allowed me to utilize ethnographic data collection techniques that enabled micro-level understanding of the phenomenon through the lens of the participant's eyes (Van Maanen, 1979; Watson, 2011). Overall, the single-case study approach allowed the collection of a rich corpus of data and observation of the phenomena over time, scrutinizing the underlying streams of activities and events and paying attention to the context.

The investigated case[8] is suitable for answering the proposed research questions for several reasons. As Mirabeau and Maguire (2014) stated: "telecommunication organizations are fertile for studies of strategy formation". The case organization operating within a dynamic industry where advancement in ICT "radically transforming the business landscape" (Telco, 2017). Secondly, this company has an online strategy community managed by a team of strategy professionals as a form of an open strategy practice. At the same time, this company also is engaged in a formalized strategy-making process as the large size of the organization and the presence of multiple business units implies organizational complexity and need for strategic coordination (Paroutis and Pettigrew, 2007). This is important as this study explores how the relatively new practice of open strategy development is organized within an existing context of strategy-making that implies theoretical sampling of the case (Eisenhardt, 1989). Furthermore, there is a lack of empirical investigation of the inclusive and transparent approach to strategy-making in the commercial organizations with established and hierarchical strategy processes (Dobusch and Kapeller, 2018). Thirdly, a large number of employees in the company allowed enough diversity required for open strategizing (Stieger et al., 2012). Finally, the collaborative research grant agreement with Telco provided me with privileged access to the organization that in turn offered unique observability of the phenomena of interest (Pettigrew, 1990).

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[8] The detailed description of the researched organization is provided in the Chapter 4.

3.2 Data collection

The data collections started in March 2017 when there was an opportunity to meet one of the leaders of the researched online community. At the same time, I have received access to the online community and could familiarize myself with the community interface, functionality and the content of online discussions. The more immersive stage of data collection started in September 2017 when I was seconded to the Telco's headquarter in Sweden. The internal status within the organization provided a great advantage as it allowed access to multiple data sources. This study utilizes different sources of information such as interview, documentary, and observational data in accordance with the traditions of SaP research (Vaara & Whittington, 2012). The following subchapters will describe data sources utilized in this study.

3.2.1 Log data

Vesa and Vaara (2014) suggest virtual ethnography as a promising way to understand strategizing work and specifically open strategizing. This research focuses on an online strategy community and hence the access to the log of the online conversations between community members provides relevant insights into the discussion's content and themes, membership characteristics and frequency of interactions between community members. On top of that, the community log contained the posts starting from the inception of the community in January 2014. It composed a rich collection of exchanges among community members *in situ* and represented a historical record of asynchronous discourse occurring online. Figure 2 demonstrates the front page of the investigated online community. This page depicted the latest posts, shared documents, discussion topics and individuals responsible for discussion moderation. It also allowed searching and collecting posts related to particular topics through the 'keywords' (button 'SEARCH' on the left-hand side). Hence, access to the community log enabled me to collect the messages as they occur in real-time and provided access to the archive of the messages posted before the researcher got access to the investigated community. This provided the opportunity to use a combination of retrospective and real-time analysis to mitigate the retrospective bias (Pettigrew, 1990).

Figure 2. The front page of Strategy Perspective Community

The community log contained 1537 posts and 3773 comments, that where extracted in Excel format. To extract information a VBA Excel code[9] was written. The code sequentially opened each post's page and "scraped" information into the Excel sheet that was consequently divided into the columns: author name, date, category, post content, and comments. The log covers posts and comments made over a period starting from January 2014 up until May 2018. Although I continued observation of online community activities up until September 2019, the selected initiatives included in this analysis span the period between December 2015 until May 2018.

Further, the investigated online community had a notification system (Figure 3). A new e-mail would be sent to community members when a new post was published online. Being a member of the online community therefore, provided me with the updates about the last activities taking place as they happened. The communication patterns disclosed in the log provided a unique opportunity to explore the practices utilized in community organizing. Being seconded to the researched organization and having access to the online platform for more than 2 years, I have been able to do online participatory observations that provided a deep immersion into the research context similar to the ethnographic approach (Van Maanen, 2006). Beyond that, being part of the online community provided me with the understanding of used communicative practices and engagement rules of the community. It also allowed me

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[9] Visual Basic for Applications is Microsoft's programming language for Excel.

to identify relevant documents for the analysis as the website contained links to the materials published on the platform throughout its existence.
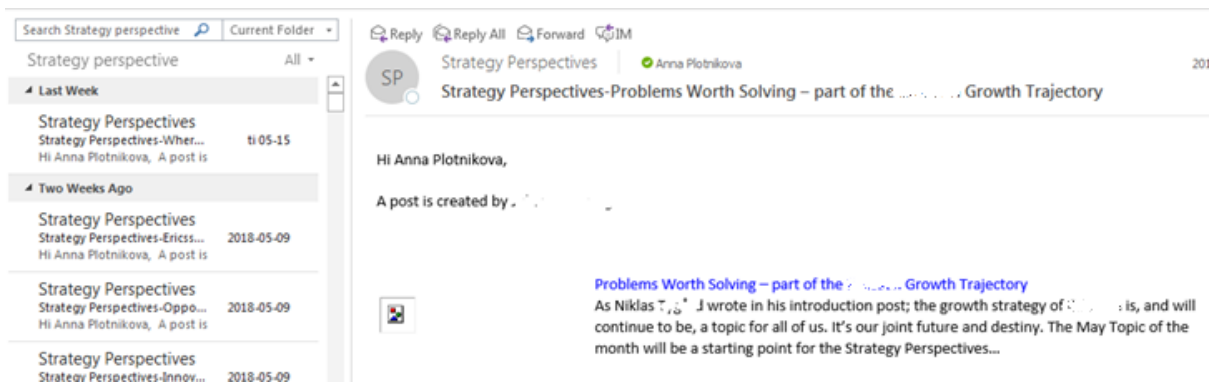
Figure 3. Notification e-mails from Strategy Perspective Community

3.2.2 Semi-structured interviews

The semi-structured interview is one of the prevalent methods of data collection in qualitative research (Alvesson, 2003). The use of interviews is a suitable tool for data collection when interviewees presumed to be "knowledgeable agents" who understand their actions and the rationale behind them (Gehman et al., 2018). Thus, the interviews allow gathering background and contextual information reflecting the participant's perspective on the researched phenomenon (Saunders et al., 2012). This study utilized 42 semi-structured interviews using a set of pre-defined themes and several open-ended questions. The protocol matrix was developed to ensure that interview themes are related to the research questions and cover all research themes equally (Castillo-Montoya, 2016). Use of semi-structured interviews themes also secured the opportunity for the respondents to provide their understanding of the investigated events and activities without rigid questions, while it also gave space for the researcher to add questions that could lead to new insights (Myers, 2013). The interview protocol can be found in Appendix 1. The opportunity to flexibly navigate through the interview plan was especially important as informants included actors from different organizational positions and had different roles in the emergence and development of the investigated online community. For instance, the interviews were conducted with actors involved in community management, actors actively involved in community discussions (frequently posting or commenting) but not involved in community organizing, as well as higher level managers who not necessarily were active

community contributors but played an important role in community establishment and utilization of its insights. Table 1 contains the information about number of interviewees and their type. During the face-to-face and skype interviews respondents were asked about their affiliation with the investigated online community, their motivation to join the community and their involvement in various initiatives and those initiative developments. Additional questions were designed according to the role of respondents in the community development. The respondents involved in strategy-making process were also asked to describe this formal process within Telco. Whereas the interviews with community leaders provided insights into various practices used in organizing the community, but also some of the challenges they faced in these processes over time.

As the data collection progressed I have interviewed some of the community leaders multiple times to clarify and confirm the chronological facts but also to test some of the emerging concepts from the initial stages of the analysis. The interviews lasted from 20 to 70 minutes and the majority were recorded, except for two interviews when respondents were uncomfortable with recording. All interviews were transcribed by the researcher and anonymised. All interviews were further triangulated with other data sources such as observations and internal documents (Gibbert et al., 2008).

Table 1. The overview of semi-structured interviews

Interview number	Date	Organizational Position	Type of actor	Interview Method (* - no recording)	Time (min, sec)
Interview 1	15.03.2017	Strategic Analysis Director 1, Strategy Group	Community leader	Face-to-face	45,23
Interview 2	13.09.2017	Director Strategy Development, and Strategic Analysis Director 1 Strategy Group	Community leaders	Face-to-face	53,52
Interview 3	18.09.2017	ICT Business Relationship Manager	Community leader	Face-to-face	57,57
Interview 4	19.09.2017	Strategic Supply Manager	Community member	Face-to-face	34,24
Interview 5	06.10.2017	Head of Strategy Development & Planning, ICT Group	Community member	Face-to-face*	60
Interview 6	10.10.2017	Strategic Analysis Director 2, Strategy Group	Community leader	Face-to-face	61,40
Interview 7	12.10.2017	Strategy Manager Supply Chain	Community member	Face-to-face	38,41

Interview 8	30.10.2017	Director Strategy Development, Strategy Group, second interview	Community leader	Face-to-face	47,01
Interview 9	01.11.2017	Business Intelligence, Strategy Group	Community member	Face-to-face	72,51
Interview 10	24.11.2017	ICT Business Relationship Manager, second interview	Community leader	Face-to-face	42,58
Interview 11	01.12.2017	Strategic Analysis Director 1, Strategy Group, third interview	Community leader	Face-to-face	39,07
Interview 12	01.12.2017	Business analyst, BU Strategic Intelligence	Community member	Face-to-face	33,09
Interview 13	06.12.2017	Enterprise Architect, BU	Community member	Skype	33,25
Interview 14	11.12.2017	Experienced Researcher, R&D	Community member	Face-to-face	44,01
Interview 15	29.01.2018	Process and Information Manager, Innovation	Community member	Skype	29,01
Interview 16	30.01.2018	Director Market and Customer Intelligence & Insights, Marketing	Community member	Skype	53,26
Interview 17	27.02.2018	Mediacom Technology Strategist, Strategy Group	Community member	Face-to-face	29,03
Interview 18	09.03.2018	Director Partnering, Strategy Group	Community member	Face-to-face	42,17
Interview 19	16.03.2018	Head of Strategy Group	Higher-level manager	Face-to-face	30
Interview 20	19.03.2018	Business Consultant, Internal Consulting Group	Community member	Face-to-face	40,03
Interview 21	04.04.2018	Director Portfolio Management, Strategy Group	Community member	Face-to-face	20,05
Interview 22	09.05.2018	Vice President & Head of Learning	Higher-level manager	Skype	33,02
Interview 23	14.05.2018	Head of Strategic Analysis, Strategy Group	Community leader	Face-to-face	45,25
Interview 24	23.08.2018	Engineer - Research, BU	Community member	Skype	40,25
Interview 25	06.09.2018	Head of Talent Planning & Development	Higher-level manager	Face-to-face	31,03
Interview 26	07.09.2018	Program Manager Technology and Architecture, BU	Community member	Face-to-face*	30
Interview 27	10.09.2018	Director Strategic Analysis 3, Strategy Group	Community leader	Face-to-face	54,45
Interview 28	13.09.2018	Director Strategic Analysis 4, Strategy Group	Community leader	Face-to-face	44,09
Interview 29	28.09.2018	Technical Product Manager, BU	Community member	Face-to-face	65,12
Interview 30	01.10.2018	ICT Strategic Product Manager, BU	Community member	Skype	37,32
Interview 31	10.10.2018	Engineer Innovation and Estimation, BU	Community member	Skype	30
Interview 32	15.10.2018	Principal Researcher Business Models, R&D	Community member	Face-to-face	26,25

Interview 33	06.11.2018	Strategic Analysis Director 1, Strategy Group, forth interview	Community leader	Face-to-face	50
Interview 34	09.11.2018	ICT Business Relationship Manager, second interview	Community leader	Face-to-face	60
Interview 35	22.11.2018	Head of Automation and Analytics, BU	Higher-level manager	Face-to-face	20
Interview 36	11.02.2019	Head of Strategic Analysis, Strategy Group, second interview	Community leader	Face-to-face	45
Interview 37	14.02.2019	Director Portfolio Management, second interview	Community member	Face-to-face	24,41
Interview 38	03.05.2019	Portfolio Strategy, Strategy Group	Community member	Face-to-face	51,55
Interview 39	03.05.2019	Strategy Development Manager, BU Strategy	Community member	Face-to-face	42,11
Interview 40	06.05.2019	Head of Strategy Development, BU	Community member	Skype	30
Interview 41	06.05.2019	Head of Strategy Development 2, BU	Community member	Skype	27,01
Interview 42	09.05.2019	Head of Technology Strategy, R&D	Community member	Skype	46,21

3.2.3 Participant observations

The 18 months secondment to the researched organization provided a unique opportunity for observations by the researcher as participant. Observation is "a complex combination of sensation (sight, sound, touch, smell and even taste) and perception" (Gray, 2004, p.238). Hence observations allowed for the high level of immersion within the research context. This study adopted a participant-as-observer type of observation (Saunders et al., 2012), hence organizational actors were aware of the researcher's identity and objectives, while the researcher also took part in some of the organizational activities. The researcher received an organizational e-mail address and daily access to the researched organization's office. Given the objective of this study to understand the activities that organizational actors undertake to organize the open strategy initiative, observations provided unique data. The research settings allowed to engage with Telco's employees frequently and to attend events like internal official meetings, workshops and informal meetings but also to observe day-to-day activities and take part in informal communications (e.g. coffee corner conversations, lunches etc.). Hence informal communications have a strong informative power since they take place in "natural settings", which reduce researcher influence on participants which may occur in the context of formal interviews (Mayers, 2013). The participant-as-observer role also allowed to witness numerous

organizational internal events like announcements and other forms of communications that shed the light on corporate level events unfolding within Telco. That provided contextual data not only about developments and the discussions of the online community but also about the developments of the formal strategy within Telco. These helped me to get a deeper understanding of organizational processes in their most ordinary way, which complemented data from other described sources.

3.2.4 Secondary data

A variety of secondary data was collected through the fieldwork. The data included the documents related to the online community activities such as internal PowerPoint presentations describing objectives of the community, summary reports from the online community platform (in PDF, PowerPoint and Word formats), presentations for external audiences, the application form for best practice award. The summary reports and presentations were particularly important as in the process of the analysis it became apparent that such reports were used as strategic artefacts. Further, other official documents described the strategy-making process and organizational strategy such as annual reports, official PowerPoint presentations, reports and strategy instructions. These data allowed me to understand the context of the formal strategy-making process. For instance, strategy instructions provided me with an overview of the annual strategy cycle, its main milestones and deliverables. I also collected data from official Telco's websites such as internal videos and articles. Video recordings often depicted internal events, such as workshops and presentations as well as official interviews with senior managers. These videos were not used for an in-depth understanding of the bodily movements of involved actors (Gylfe et al., 2016; Wenzel and Koch, 2018) but rather for the comparison of the themes discussed in the online community and general strategic narrative within the studied organization. In the same vein, I have collected internal newsletters authored by Telco's CEO, covering the main organizational objectives and strategic vision. This again provided a better understanding of the general strategic narrative. Finally, due to the internal status within Telco, I was allowed to collect numerous e-mails circulating between community leaders and some of the community members. This provided a unique insight into a "backstage" of community organizing as this type of communication was not visible to other community members. The overview of the used data sources and their use for the analytical process is described in Table 2.

Table 2. The description of data sources

Data sources	Type of data	Use in analytics
Interviews	13 interviews with 7 community leaders (all strategy professionals except for one)	Gathering information about community emergence and orchestration by community leaders. Given that the majority of respondents were professional strategists, also gathering information on the formal strategy-making process.
	25 interviews with community members	Understanding the involvement of various actors in community projects. Given that some respondents were professional strategists, also gathering information about the formal strategy-making process. Additionally, understanding of various practices used for participant mobilization.
	4 interviews with higher-level managers	Gaining an understanding of the community impact.
Observations (memos from the formal and informal meetings)	16 informal meetings with community leaders and members	Provided the understanding of "backstage activities" of the online community.
	3 formal meetings with strategy professionals on the formal strategy process	Provided insights about the deliverables of the formal strategy-making process.
	18 months of participant observation within Telco	Provided understanding of Telco's internal processes and events specifically related to the formal strategy-making process.
	29 months of participant observation in online community discussion	Gaining an understanding of community functioning, following emerging discussions and broader themes. Observing backstage activities.
	Attendance of 2 Annual strategy Conferences	Understanding general Telco's strategy, the formal-strategy-making process and identification of relevant professional strategists for further data collection.
Community log	Content of 1537 posts and 3773 comments in the online community	First orders discourse of community members and community leaders. Information about community activities. Insights into initiation and overview of various projects. Provided an understanding of main strategic themes and involvement of various actors.
	Posted in the online community images, documents, and links to other web resources.	Provided the depository of the documents published on the strategic platform.
Archival data	PowerPoint presentations and 10 reports as artefacts emerging from the platform, 2 videos of the presentation of strategic artefacts from the internal network.	Provided evidence and content of the strategic artefacts.
	PowerPoint presentations and internal documents describing the formal strategy process.	Understanding of the formal strategy-making process.
	Internal documents and PowerPoint presentations	Gaining an understanding of the community principles and goals.

	describing the community's activities.	
	E-mails related to community emergence, development and deliverables.	Provided the understanding of off-line and backstage activities related to the researched online community.

3.3 Data Analysis

The general analytical approach throughout this study was inspired by the grounded theory (Glaser and Strauss, 1967). Hence the data analysis was done in an inductive and interpretive manner. As Corbin and Strauss (1990) argued, the ongoing iteration between data collection and data analysis is central to this approach and allows for ongoing theorizing that leads to further data collection. Being seconded to the organization allowed the flexibility of moving between the collection of various types of data based on the emerging theoretical concepts. In my analysis, ongoing comparison between different data sources was utilized (community log, interviews, observations and documents), but I also continuously compared emerging theoretical concepts and existing theory. These activities are characteristic to the grounded approach in the analysis (Suddaby, 2006). To organize the data Nvivo12 was used, which is an efficient tool for purposes of data coding and recoding, searching and identification of themes and subthemes. The data analysis was performed through several stages as I collected more data throughout the process.

As this study aimed to answer two different research questions, the stages of the analysis had a different level of relevance for each research question. The initial stage of the analysis was relevant for both research questions as it provided a general understanding of the online community goals, the occurring discussions and activities performed by the community leaders as well as other participants. The stages two and three were related to the understanding of bridging between the open strategy practice and the existing system of strategizing activities and hence was relevant for research question one. The final stage of data analysis was related to the understanding of organizing challenges that community leaders faced. Specifically, at this stage, I focused on analysing how boundaries of participation and content were managed throughout the online community development. Therefore, the final stage of the analysis is relevant for replying to research question two. Table 3 provides a summary of analytical stages and its relevance for research questions.

Table 3. The summary of analytical stages and their relevance to research questions

Research question/stage of analysis	Stage 1	Stage 2	Stage 3	Stage 4
1) How do managers bridge open strategizing within an online community and formal strategy-making, characterized by closed and hierarchical decision-making?	The general understanding of online community development, central actors, discussion's content, activities of core actors, outcomes of community discussions.	Analysis of differences in communicative practices in formal strategy-making and online community collaboration	Analysis of practices facilitating bridging of formal strategy-making and online community collaboration	n/a
2) How do managers organize an online strategy community to influence strategic decision-making in large organizations?		n/a	n/a	Analysis of the most salient decision areas and choices for community organizing.

Stage 1. Analysis of the community development

My research analysis started from building up a timeline of online community development and recognized a focal group of actors who were actively involved in the community creation and its maintenance. Next, I also identified participants who were active contributors to the discussions and initiatives. By continuously reading and rereading interviews with community leaders, members and my field notes I have coded various types of practices that were used in community orchestration. I also started reading the community posts to understand the general narrative of community discussion. Further, eight initiatives emerging from the online strategy platform were identified (see Sub-chapter 4.3). The initiatives were chosen based on three criteria: 1) they all utilized information generation an online strategy community; 2) they were summarized in the form of an artefact; 3) they were further communicated to the senior management in Telco. In the analysis of organizing practices, I focused on the activities of community leaders in their day-to-day work that led to initiatives' emergence and consequential transformation of these initiatives into strategic artefacts.

At this stage, it became obvious, that the way the online community operated was extremely divergent from the way formal strategy-making processes were run. On top of that, the continuous coding of activities performed by community leaders revealed that those activities were aimed at two different groups of organizational actors: community members and senior managers. The former were mostly aimed at increasing participation and engagement, while the latter was related to influencing

the decision-making process. Hence, the community leaders were determined to attract the attention of both types of audience. The notion of 'attention' brought me back to the literature and specifically to the ABV theory (Ocasio, 1997) that explains the process of strategy-making as systems of distributed communication channels that define organizational issues and answers that decision-makers attend to. Further reading of ABV literature brought me to the realization of the importance of communicative practices that facilitate attention shaping (Ocasio et al., 2018). Hence, in my further analysis, I have focused on understanding communicative practices in two different organizational processes - online community and formal strategy-making.

Stage 2. Analysis of communicative practices in different organizational processes
To understand the differences between communicative practices of formal strategy-making and online community collaboration several analytical categories of communicative practices suggested by Ocasio et al. (2018) were utilized. Authors define communicative practices not as "the content of communication but the means through which communication happens" (p.159). These categories included: use of technology (how communication tools are used), participation rules (what are the rights for participation of various actors), norms of interaction (what is the appropriate pattern of engagement between participants), and conventions of language use (how written or spoken words are used in communication).

For the formal strategy-making process, I focused on interviews with professional strategists, and where possible collected additional data. For instance, additional interviews were conducted with individuals holding strategy-related job roles. Also, my internal status within Telco allowed for observations of several formal internal strategy meetings. In addition, I watched internal videos that depicted strategy workshops or strategy related events. In the analysis of the online community communicative practices, I heavily relied on my observation of community collaborations, log information and interviews with community members. Further, through continuously reading and rereading of available data and transcripts I have coded it according to four analytical categories focusing on the distinctions between two processes. Some of the differences between the two processes already were identified in the literature. For instance, the fluid nature of collaborations in online communities and its comparison with a traditional hierarchical way of organizing was discussed by Faraj and colleagues (2011) while the openness of participation in online communities is

described in open strategy literature as one of its advantages (Birkinshaw, 2017; Hautz et al., 2017). Yet, I also identified other distinctive features, specifically in the category of the language use, that were supported by the empirical data but less acknowledged in the literature (use of rhetorics, approach to ambiguity and uncertainty).

When analysing the conventions of language use I focused on the rhetoric used by actors participating in both organizational processes. Although theoretically, I treated rhetoric as the deliberate use of persuasive language (Suddaby and Greenwood, 2005, p.41) that managers use in their day-to-day activities often without recognizing it themselves (Giddens 1984; Heracleous 2006), I haven't employed the rhetoric as an analytical lens as it is used in studies focusing on the understanding of the strategic discourse (Jarzabkowski and Sillince, 2007; Sillince et al., 2012). I used the rhetoric as a way to differentiate between two organizational processes. When analysing formal strategy-making I relied on my field notes that reflected some of the persuasion practices noticed at official meetings and in strategic artefacts used by strategy professionals. When analysing communicative practices in the online community I relied on community log and observations. For instance, not surprisingly, it became apparent that more rational arguments were used in the formal strategizing process, while communications among community members were more emotional and often included metaphor and references to personal emotions and experiences. This analysis resulted in the table of 'ideal type' practices for the two distinct communication channels (see Sub-chapter 5.2).

At this stage, I had enough evidence that the two organizational processes adhere to distinct organizing logics (Sambamurthy and Zmud, 2000) specifically through the use of different communicative practices (Ocasio et al., 2018) that have to be reconciled for the achievement of strategic influence. In addition, I have identified a number of practices used by community leaders that did not fit into either category of communicative practices, but were located rather amidst. When consulted with the existing literature I have realized that some practices resembled the notion of 'bridging' that allowed two competing logics to co-exist (Smets et al., 2015, p. 958). Hence, in the next round of analysis, I have focused on the practices used in achieving such bridging between formal strategy-making and online community collaboration.

Stage 3. Analysis of bridging communicative practices

The bridging practices were coded separately. In this stage of analysis, focus was much more on the community leaders' activities. These were understood through reading and rereading of their interviews, observation notes and deeper analysis of community log (specifically community leaders' posts) and strategic artefacts synthesized from the online platform. While these activities were free coded it became apparent that some of them were aimed at community members, while others towards the senior management. For instance, the activities like "using strategic concepts as Topic of the Month[10]" was directed to the community members, while "presenting the synthesized strategic artefact to CTO" was directed to senior managers. Hence, I cross-coded identified practices according to the direction of their intentionality. I have received two large groups of activities aimed at two types of audience. Following Gioia et al. (2013) I have further abstracted these codes into second-order themes. Further, I have aggregated these second-order themes into three mechanisms facilitating bridging between two distinct organizational processes (Figure 4). I performed this step several times, making extensive use of notes and personal observations to interpret the data.

First, a number of second-order themes was related to the use of the strategic concept. Strategic concepts are "linguistic expressions, essentially words or phrases with established and at least partly shared meanings, which play a central role in an organization's strategy discourse" (Jalonen et al., 2018, p.2795). For example, the strategic concepts like "networked society", "digital transformation", "business models" were frequently used by community managers. However, these concepts were also frequently occurring in strategy documents and speeches of Telco's senior management. Hence, I have identified all second-order themes related to use of the strategic concept as a mechanism that is aimed to link general strategy discourse and online discussion and labelled it "*bidirectional framing with strategic concepts*". However, this mechanism only partially explained the bridging process through transfer of the meaning between two audiences. Another group of second-order themes was related to the practices that community leaders performed to mobilize the community engagement but at the same time, to alleviate consequential issue-selling

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[10] 'Topic of the Month' – in the context of the investigated online community refers to a discussion theme for a particular month that was visible on the front page of online collaboration platform.

toward senior management. These activities somehow aimed to utilize institutionalized practices of strategy-making while allowing for more open practices of online community collaboration. This group of second-order themes was labelled "*bidirectional structuring for communication*". On top of the two mechanisms, the analysis also revealed a group of second-order themes that were simultaneously relevant for both types of audience. Community leaders performed various activities to justify the relevance of processes through which the online community operated. For instance, by "demonstrating positive feedback from participants" community leaders aimed to explain community value for Telco while also attracting new participants. The aggregated mechanism reflecting such activities was labelled "*legitimacy of openness*". Figure 4 presents the final data structure resulting from this phase[11].

Finally, having identified these three mechanisms I started to analyze how their relationships facilitate the bridging between co-existing formal strategy-making and online community collaboration. First, I have theorized the effects achieved through the use of "*bidirectional framing with strategic concepts"* and *"bidirectional structuring of communication"* for two different processes. Secondly, it became apparent "*legitimacy of openness*" does not enable direct bridging, but rather facilitates the bridging achieved through two other mechanisms. Hence, the theorizing of the links afforded by bridging mechanisms for two different processes has enabled me to build the grounded theoretical model (Figure 11) that will be discussed later (Sub-chapter 6.1).

Stage 4. Analysis of the community leaders' decisions

Finally, to answer the second research question, I returned to organizing practices identified in the first stage of the analysis. I have coded them again, however with a different analytical focus. For the purpose of identification of organizing decisions, I mainly focused on interviews with community leaders and observations of meetings

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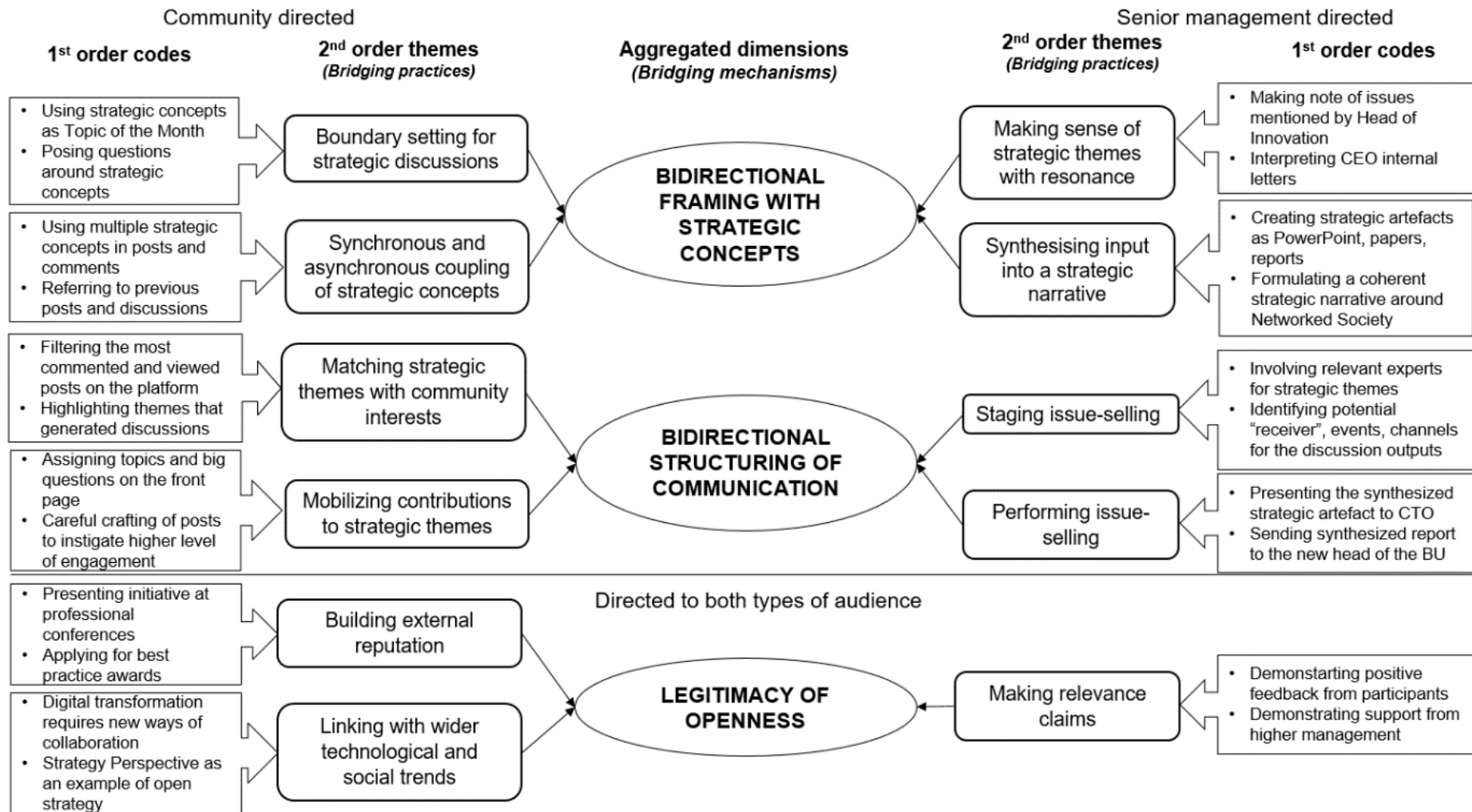
[11] Figure 4 is presented on the next page.

Figure 4. Data structure for developing theoretical inferences from raw data

related to community coordination. I have coded all the situations that were considered to be challenging by community leaders and required the discussion and consequential decisions from their side. While some of the challenges occurred over time due to community growth, others had to be dealt with early on in the initial stages of community creation. That allowed me to create a list of choices that community leaders faced throughout the process of community development.

Further, I have grouped identified choices into broader categories that resulted in three decision areas concerned with *community structure*, *community growth* and *content of community discussions*. In addition, by continuously re-reading data related to the three decision areas I have identified choices that created perplexing contradictions; such contradictions were characterized by choices that were reconsidered over time. For instance, the decisions to include only internal employees changed to a decision to give limited access to external actors. Next, the aspiration to engage senior management was not fulfilled and the community leader had to reconsider how they can use inputs from senior managers differently. Similarly, the decision to allow the online exchanges to emerge naturally was eventually changed by the decision to have a more structured approach to the content of community discussions. Further analysis of such transformative choices revealed more interconnections between three decision areas. Finally, within each decision area, I have abstracted two main considerations that community leaders had to make when implementing the online strategy community. All decision areas underlying considerations and their connections were depicted in the final conceptual model (Figure 12) discussed in a following chapter of this thesis (Sub-chapter 6.2).

3.4 Ethical considerations

This research project was part of the bigger European Union-funded project (№675866 — COINS). Hence, all ethical considerations were addressed in the research consortium agreement. The consortium agreement also covers the approval for using the data obtained during the research project in this PhD thesis and consequent academic publications. On top of that, prior to entering the field, the researcher obtained the approval of ethical review (reference LTLUBS-176) from the representative of the ESSL (Education, Social Science and Law), Environment and

LUBS (AREA) for research from Leeds University Research Ethics Committee (see Appendix 2).

Despite the fact that the researcher received an 'internal' organizational status that implied daily access to the premises of a researched organization and granted a corporate e-mail address, the researcher was not employed by the host organization and did not receive any type of rewards from the host organization or its members. This secured the absence of conflict of interests.

During the data collection, all research participants were informed about the purpose of the research verbally and by presenting them with an information sheet (Appendix 3). This document contained the following information: researchers contact details, the reason for inviting the participant to take part in this research, the confidentiality of collected information, the opportunity to withdraw from the research at any time, further use of collected data and funding body for this research. All participants also were asked to provide their consent for voice recordings in the interviews. The collected information about the names of participants was anonymized.

Chapter 4. Research settings

This chapter introduces the research context of the study - a large telecommunication corporation Telco (pseudonym). The context description contains the explanation of Telco's organizational structure with a particular focus on the position of the Strategy Group within the organization and its responsibilities. This focus is motivated by the fact that the online strategy community under investigation was developed by the members of this group. Further, the strategy-making process within the organization is explained, specifically with the emphasis on the reasons for the more inclusive strategizing. Next, the investigated online strategy community is described, followed by some descriptive statistics and the table of selected strategic initiatives originated from the online strategy platform.

4.1 Research setting for studying open strategizing

Telco is a Swedish telecommunication and networking equipment manufacturer and provider of related services. It was founded in 1876 and grew into a large multinational organization with more than 95 thousand employees globally and customers in 180 countries (at the moment of investigation). Telco has a matrix organizational structure (Figure 5) were a number of business units (BUs)[12] is responsible for development and production of different product categories, while market areas (MAs)[13] are responsible for selling those products in respective markets. In addition to that, several group functions (GFs)[14] provide services to the entire organization without having financial goals and responsibilities.

In 2010 Telco started to recognize industrial changes and particularly the convergence between telecom and ICT industries. Telco's executive team labelled this situation as the emergence of the Networked Society and has "*taken the decision to increase its efforts to approach customers in new segments, such as governments, health industry, transport and utilities*". The new industry landscape implied the emergence of new competitors such as ICT players who previously were not considered. Further, Telco started to engage in the development of a new standard (5G) which unlike developments of previous standards (2G, 3G and 4G) involved a

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[12] A segment of a company representing a specific line of products.
[13] A segment of a company representing a specific geographical region to which organizational activities are targeted.
[14] A segment of a company representing a particular functional area (e.g. marketing, legal affairs, HR, technology, strategy etc.) and serving the entire organization.

significantly higher number of actors participating in the standard development. This created additional interdependencies and need for collaboration with new partners that Telco has not partnered with before. In addition, new collaborations required the development of new business models different from Telco's traditional value creation models.
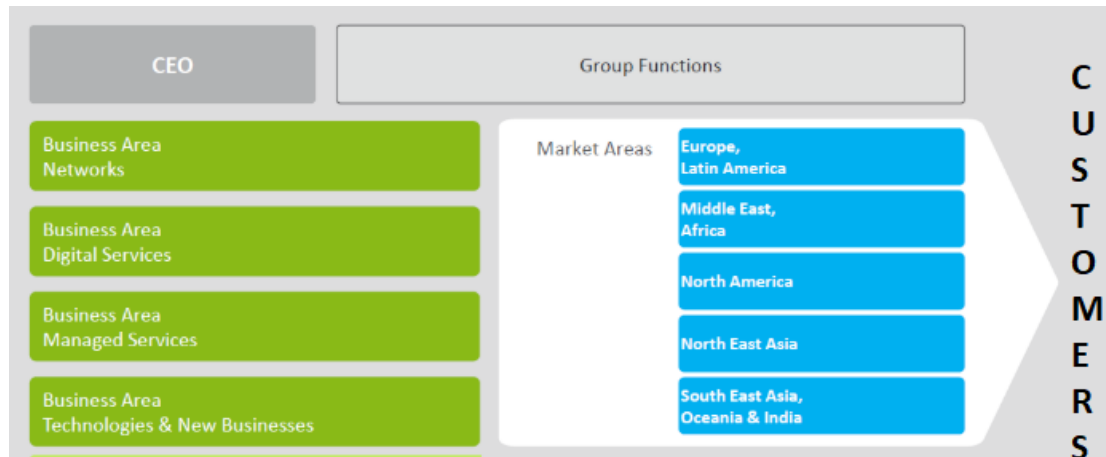
Figure 5. Telco's organizational structure in 2018

Finally, entrance to the new areas required additional efforts in understanding new customer's "pain points". All these challenges exponentially increased the complexity of the strategy-making process and specifically the analysis of the external environment as it had to become broader and consider competitors and trends outside the conventional boundaries of the telecom industry. Hence, the challenges described above required new practices for strategy-making in the more complex telecommunication industry.

4.2 The formal strategy-making process within Telco and the role of the Strategy Group

The Strategy Group (SG) is one of the GFs that was established already in 1992. Internal documents describe the work of this group as follows: "*The Strategy Group's responsibilities span from strategic business intelligence through strategy formulation, new business development, strategic third-party relations, JVs [Joint ventures] and Alliances, mergers and acquisitions to target setting".* Hence, the SG in Telco is responsible for driving, coordination and alignment of Telco's corporate work in the aforementioned areas. The SG serves Telco by continuously providing strategic information, outlooks and forecasts, decision support, strategic issue identification and resolutions. The SG is also responsible for a number of information sharing and

decision-making forums. The structure of the SG was designed to fulfil the assigned responsibilities.

The SG actively supports Telco's strategy-making process that is systematic and event-based. Figure 6 demonstrates the annual cycle of strategy-making consisting of milestones, and is similar to a strategic planning cycle described by Grant (2003). The preparation for the new strategy cycle usually started in the fall of the year when the SG prepared a Situation Analysis – a qualitative compilation of market trends and its potential implications for Telco's businesses. Next, the Strategy Conference would take place at the beginning of a year. This event is coordinated and led by the SG and focused on exchanging the strategic insights and identified challenges between strategy teams in Telco's BUs, MAs and GFs. The Conference serves as a strategic alignment episode. Once heads of strategy from all organizational units are updated on the ongoing trends within the industry and about the broader geopolitical environment, they are tasked with the preparation of business plans. The SG in collaboration with BUs and MAs is responsible for the Strategic Forecast – a five to six-year market size forecast that would help to estimate the expected revenues. Further, the SG is also involved in providing feedback to the proposed business plans. Next to that, in the first quarter of the year the SG would be responsible for preparing Strategic Directives - the most critical for organizational strategy questions for BUs, MAs and GFs to be addressed. Those activities lead to the preparation of the Leadership Summit – another strategic alignment episode where top 300 leaders of Telco come together to review and anchor the future direction of the company. In reality, this event has a more internal communication purpose for all BUs, MAs, and GFs to be updated on each other's plans as the discussion of the most central strategic questions takes place prior to the cross-organization meeting. After the Leadership Summit, when business plans for BUs and GFs are approved, MAs use those as an input for their planning, further refinement and approval. The remaining quarter of the year is used for Strategy communication to external parties such as investors and final approval of the strategic targets by the Telco's board.
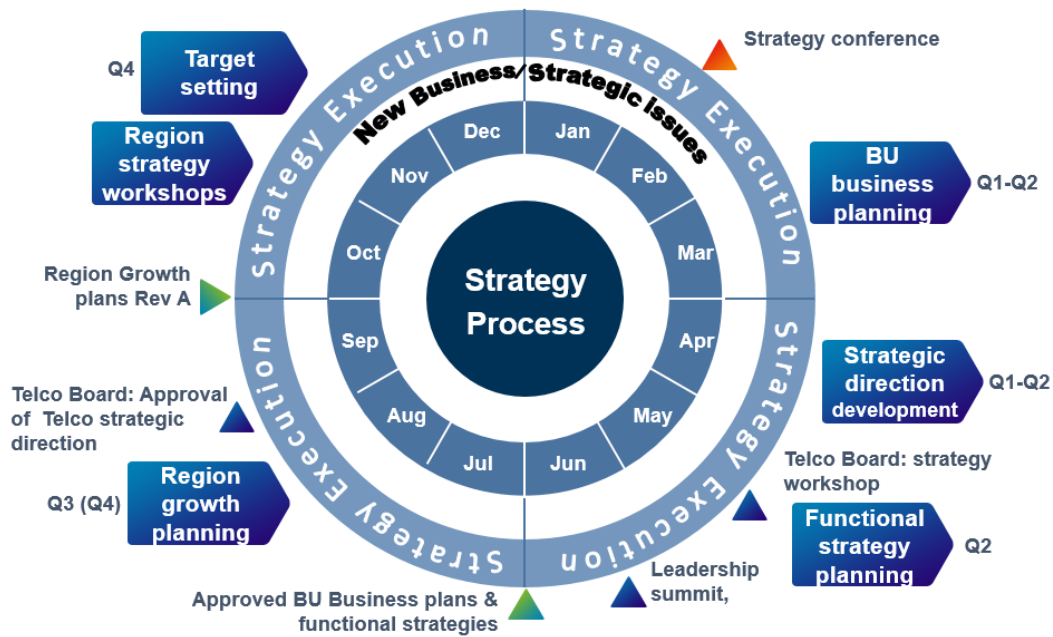
Figure 6. Telco's formal strategy-making process

This formal strategy-making process also includes work with strategic issues. Although not represented clearly in the illustration above, the SG is involved in coordination and driving of a formal forum for strategic issue identification and monitoring called the Strategy Council. The Strategy Council includes actors representing various parts of Telco to ensure the relevance of strategic issues on the corporate level. The identified and prepared cross-organizational strategic issues are further presented to the Group Strategy Board (GSB)[15] and Group Portfolio Board (GPB)[16] (Figure 7). The GSB is focused on strategic issues that have implications for strategy setting and clarification of short-term and long-term objectives, while the GPB is focused on strategic issue resolution through its prioritization and further selection and assignment of relevant strategic initiatives.

The described responsibilities of the SG were becoming more complex due to the changes in the telecommunication industry experienced by Telco as described earlier. This encouraged the SG to search for new ways to collect strategically relevant information that could be used in strategic planning, strategic analysis and strategic issue identification within Telco. This led to the emergence of a new open strategy

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[15] Quarterly scheduled meetings, chaired by CEO and with Head of Group Strategy as a driver, focused on resolving strategic issues of a cross-unit nature with a "What" focus.

[16] Quarterly scheduled meetings, chaired by CEO and with Head of Group Strategy as a driver, focused on resolving strategic issues of a cross-unit nature with a "How and How Much" focus.

initiative – an online strategy community - instigated by several individuals from the SG. Hence, a group of professional strategists became online community leaders. Therefore, in this thesis, the terms 'professional strategists' and 'community leaders' are used interchangeably.
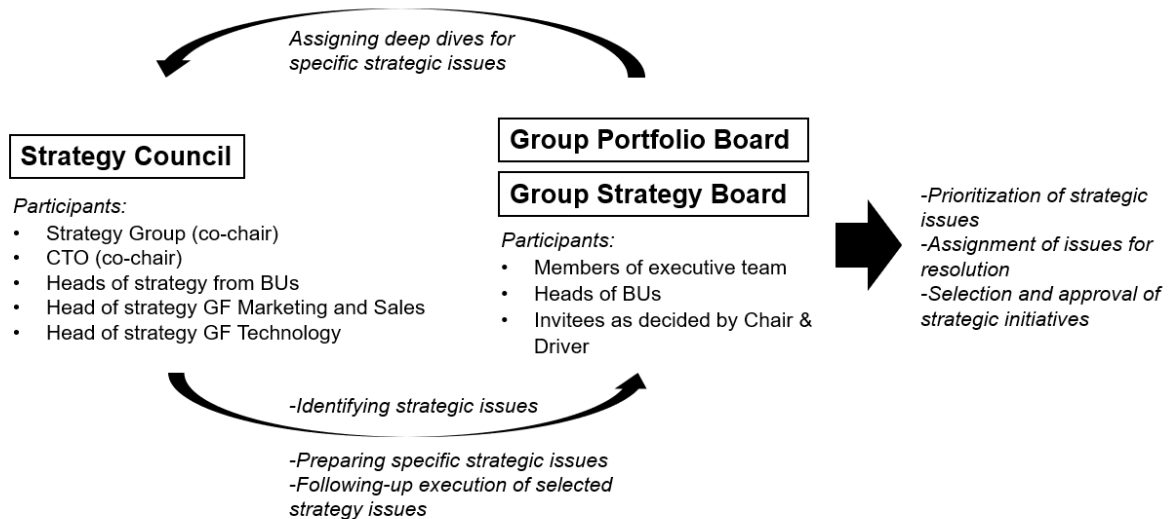
Figure 7. Telco's process of working with strategic issues

4.3 Strategy Perspectives - online strategy community under investigation

In 2014 an online strategy community called "Strategy Perspectives" (SP) was launched by a group of professional strategists. This online platform was initially inspired by IBM's "Innovation Jam" programme (Bjelland & Wood, 2008) and aimed to create a community capable of unconventional thinking. As community leaders explained it in the opening post: "*It [online strategy community] is here to serve as a catalyst for different strategic perspectives. By bringing together perspectives and translating those into actionable insights and foresights this blog hopes to serve in supporting Telco in designing our future*". Hence, SP's community members have a common goal to generate and share various perspectives on strategic issues that could trigger articulation and reflection on the organizational strategy. Discussions occurring on the SP forum concerned various topics, starting from understanding implications of environmental changes on the corporate future and strategy, to the discussion on working practices. In this study I have identified 109 'post tags' used by community members to tag their posts and 36 topics defined by community leaders. I

have reduced these tags and topics to five major themes (Figure 8). The majority of discussions were related to disruption and the digital transformation of the businesses (29%), followed by discussions on new emerging technologies (22%), competitors (18%), and internal organizational capabilities (17%). The rest of the posts (14%) did not fall into any of the aforementioned categories. The topics and tags were often interrelated and could be assigned to all four themes simultaneously.
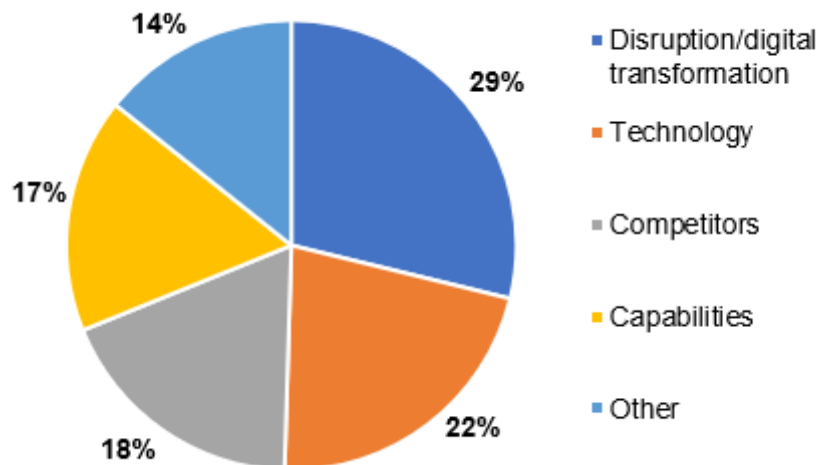
Figure 8. The most frequently discussed themes in the SP community

Next, although the SP is dedicated to the discussion of strategy-related questions, its membership has a wide diversity of participants across Telco. In this study I have identified 502 unique users (individuals who published at least one post or comment). This provided a fairly high participation level (ratio between unique users and number of registered members): more than 25%. The community's participants represent 48 countries, with the majority of members (44%) representing Sweden, Telco's home country, followed by India and the USA (both 9%). With regard to job areas, service delivery has 18% of participants, followed by strategy professionals (16%) and product development employees (11%). Overall, community members represent more than 30 varied job roles from across approximately 20 job areas. Figure 9 demonstrates the level of participants' activities over the more than four-year period (January 2014 – April 2018) through the number of posts and comments made on the platform.
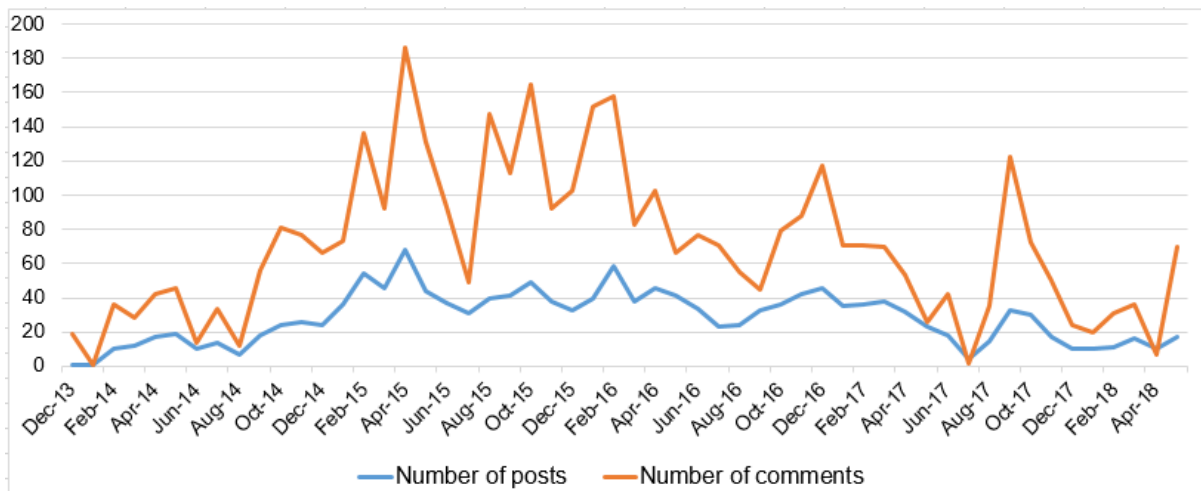
Figure 9. Timeline of activities within the SP community

The collaboration between members of the SP occurs via an Internet-mediated platform built on Telco's internal software. SP members join the platform and engage in discussions voluntarily. Additionally, unlike many other online communities, which operate on the principles of anonymity, SP participants' names are exposed and their personal information, such as position and geographical location, could be obtained from the corporate address book. The SP community has an email-based alert system. Hence, every time a new post is created each member of the community receives an email that displays the text of the post. On one hand, this allows members to follow new posts and identify posts relevant to them. On the other hand, as the number of alerts per day increased this created a negative attitude towards the SP as a source of "spam".

The discussions on the SP platform are often summarized into strategic artefacts (written reports or PowerPoint presentations) that were communicated to senior managers in order to influence strategic decision-making processes. Eight strategic initiatives concluded in strategic artefacts were chosen to make further analysis (the criteria were discussed in section 3.3). These initiatives could be divided into two groups: 1) technology-related; 2) capability-related. The former is concerned with new emerging technologies and how its adoption by various players (including Telco) could affect Telco's performance, and consequently its position within the competitive landscape. The latter theme is concerned with the key factors that facilitate a successful transformation of Telco through the acquirement of new strategic capabilities. The summary of strategic initiatives is presented in Table 4.

Table 4 The description of selected strategic initiatives

Initiative number/name/ time period	Project Initiation	Participation in project	Collecting insights	Strategic artefacts	Selling of strategic artefacts
Technology related projects					
1. Satellite technology December 2015	The SP discussions frequently featured concerns towards airborne systems posing threats to cellular technology (Telco's core business). Community leaders started an initiative aimed at getting a deeper understanding of the satellite industry trends and opportunities for Telco to enter satellite market.	The project was announced on the SP platform and members were invited to join. Beyond volunteers recruited on the SP, one or two additional experts were invited personally by e-mail.	The project generated insights through interviews with experts within and outside Telco (through a partnership with a consulting company) and combined it with contents of community discussions on satellite technology.	The Word report and PowerPoint presentation were prepared. On top of that one of the project members has recorded a video presentation.	The presentation was given to 20+ people from the BUs (level reporting to CTO), presentation for the head of the strategy. The presentation was given by 3 members of the project team. The community leader was involved in the introduction.
2. Artificial Intelligence (AI) September 2016	A number of SP discussions on the platform were concerned with the rise of AI and the potential of this technology for various use-cases. The intention to gain better understanding motivated community leaders to make AI a topic of community discussion.	Community leaders identified an individual from one of the BUs interested in the topic and suggested to become a topic driver. The topic driver invited several relevant contributors.	The topic driver planned the Topic of the Month posts sequence. On top of the blog post prepared by the topic driver and invited contributors, members of the SP community could comment and add their insights.	Word report synthesized and integrated all posts and comments on the platform during the month.	The report was sent to the head of Automation & AI Transformation Group and also published on the SP platform. Later, some of the insights were formalized in AI strategy (3A principles).
3. Blockchain (BC) November 2016	A number of discussions in the SP were concerned with use cases of BC. Community leaders initiated a discussion around the topic. The main goal was to raise awareness about new technology not only with regard to its advantages but also its challenges, specifically in applying it to the existing products of Telco.	Community leaders approached the expert in BC within Telco and asked him to contribute and lead the discussion.	The broader community was invited to contribute to the discussion. Existing documents on BC were published (presentation) and community members were invited to discuss the BC technology and its implications for Telco. The summary of the discussion was published in one of the posts.	The PowerPoint presentation was prepared by the Telco's expert on BC.	The PowerPoint presentation was uploaded to the learning portal in the portfolio "Digital Skills". All employees could access this material.
4. Quantum computing technology (QC) May 2018	One of the SP members was actively stimulating the discussion for QC. There were numerous posts about new technology and its potential implications for Telco's business. Community leaders decided to set QC as a discussion topic.	One of the community leaders became a topic driver and invited a strong group of experts from technical units of Telco to facilitate the discussion (directly via e-mail).	Community members were invited to join the discussion. Experts were working together to prepare a presentation that explains the QT and strategic relevance for Telco's business.	A PowerPoint presentation was prepared.	The presentation was given to the CTO. After CTO request for further clarifications, the follow-up presentation was given.

Table 4 Continued

Capabilities related projects					
5. More of the same is not enough December 2015	A number of posts on the SP pointed out the inevitability and salience of digital transformation and the changes that large organizations have to go through to survive in the new digital era. Community leaders decided to focus on this theme as a main topic for a paper.	Community leaders announced the initiative and invited SP members to join the project leading team. Further, the decision was made that one of the community leaders will be a lead author to shape the paper and guide the collaboration between the project members.	A selected group of people was working on synthesizing insights posted on the SP platform. The project team agreed on the outline of the paper and divided the labour among participants. The posts from the SP were actively utilized.	Word format paper. PowerPoint presentation. Video recording of the actual presentation.	The paper was sent as a pre-read material for the meeting among the heads of BUs. The presentation was given during the Conference (the Strategy Conference is an annual meeting between heads of BUs and strategy group)
6. A Networked Society Playbook January 2016	This project was developed in parallel with the previous one. The approach mirrored the activities taken for the project "More of the same is not enough". However, if the later was concerned with the depiction of the changing environment and the need for change this project was mostly focused on the principles that can guide the transformation.	Identical to initiative 5.	Identical to initiative 5.	Word format paper. The insights of this paper were added to the PowerPoint presentation with the title "More of the same is not enough".	Beyond presenting during the pre-conference both papers were uploaded to the Telco learning portal as learning material for portfolios "Strategy Skills" and "IT"
7. Business models (BM) May 2017	The initiative was developed as a response to the CEO call for the development of new BMs. Community leaders decided to utilize the SP for collecting relevant insights.	A community leader invited Telco's expert in BMs and offered him to become a topic driver. The SP members were invited to contribute to the discussion.	The topic driver together with the community leader has planned the Topic of the Month sequence of the posts and systematically posted content in line with the agreed plan.	The collected insights were synthesized in a PowerPoint presentation.	The presentation was given to the heads of the BUs. This presentation was one of the inputs that heads of BU's used during the meeting with the CEO.
8. The Science of Emerging Business March 2018	Prior to the appointment of the new head of BU Technology and Emerging Business, community leaders decided to use the SP community for producing an overview of the attempts to organize Emerging Business in Telco earlier and formulate relevant recommendations and insights.	Community leaders selected a topic driver and invited core contributors. SP members were invited to contribute with additional posts and comments.	Several external and internal experts were asked to write posts around their experiences of working with innovation or new business projects in Telco.	Word report was prepared.	The report was sent to the new head of BU, also to the Head of Strategy who was reporting to the head of BU.

Chapter 5. Findings

This chapter begins with the description of the online community objectives and the challenges that these objectives impose for community leaders; this is relevant to both research questions (Sub-chapter 5.1). Next, in relation to Research Question 1, the analysis conceptualizes the differences between formal strategy-making in Telco and its open strategizing via the process of online collaboration. Through this, different and sometimes contradictory communicative practices utilized in two organizational processes are identified (Sub-chapter 5.2). Next, the analysis presents a set of mechanisms that enables bridging between formal strategy-making and online community collaboration processes (Sub-chapter 5.3). The illustrative evidence for each mechanism is provided as well as the narrative description of underlying practices utilized in the bridging process. Finally, to answer Research Question 2 the analysis presents three identified decision areas that community leaders have to address in the process of online community organizing. These decision areas are illustrated through three vignettes describing contradictory demands and their interrelationships in each decision area (Sub-chapter 5.4).

5.1 The objectives of the online strategy community

As was already described in Chapter 4 on research settings, the SP online community was created as a shared space, where organizational actors could engage in dialogue about Telco's strategy by sharing business intelligence insights and latest practices from top business schools and consultancies to create a common language and methodology of working with the strategy in the organization. Further, another objective of the community was to create a learning platform where Telco's strategy professionals across the organization could collaborate and share their knowledge. As a community leader explained in the interview:

> *"[The] basic idea was … we actually tried to drive learning, to get this very dispersed fuzzy community* [of strategists], *that actually didn't exist. I mean, we had a network. So, people working with strategic forecast, people working with champions [leaders for various strategic initiatives, usually senior managers], also covering different competitors that are important. So, we wanted to connect this a little bit better"*

As the community was developing, it received great support from a large number of participants and "*went beyond expectations*". Besides the participation of strategy professionals, a large number of other individuals representing diverse functions and

departments joined the SP. Since its inception in 2014, in two years, the SP initiative gained 1,000 registered members and by May 2018 that number reached almost 2,000, which showed "*an amazing support for the SP initiative*". The rapid expansion already in the early stages of community development created a momentum, but also brought a change in community aspirations. The active community generated great strategic insights that brought the community leaders to a new realization. What if on top of being the platform for strategic knowledge sharing and learning, this online platform could be used to generate insights and strategic initiatives with a more direct influence on Telco's own strategy. As one of the community leaders described it in the interview:

> *"This is a very good community of practice, very active. Should we become a community of impact?".*

This idea of strategic impact brought a lot of discussion among community leaders and its members, but it also created an immense challenge. The formal strategy-making process has multiple communication channels that were completely independent from the online collaboration process ongoing in the SP. Hence, there was a challenge of translating the discussions going on online into relevant and credible information that could be considered in the formal strategy-making process. Further, the practices utilized in formal strategy-making were different from practices utilized for online strategy debate. This, of course, was an advantage of the SP online community as it enabled unconventional and diverse perspectives and discussions around the issues divergent from the formal strategy-making. Yet, this very advantage was also a detriment, as it constrained smooth integration between two different organizational processes. Hence, the formal strategy-making and online community collaboration processes were not integrated. On one hand, the more distinct the SP online community would be from the formal strategy process, the less integrated it could be and therefore the impact of the online community would decrease. On the other hand, the more integrated the SP community would be with the formal strategy-making process the less likely the community would generate distinct and novel insights through online collaboration.

5.2 The differences in communicative practices of formal strategy-making and online community collaboration

To understand the differences between the divergent processes of formal strategy-making and online community collaboration I utilized four analytical categories: technology use, rules of participation, norms of interactions and conventions of language use (Ocasio et al., 2018)[17]. The systematic analysis of those categories revealed the fundamental difference in communicative practices of formal strategy-making and online community collaboration as summarized in Table 5.

Table 5. The characteristics of communicative practices in the formal strategy-making process and the process of online community collaboration

Formal strategy-making	Online community
Technology use	
Limited use of technology • Oral presentations and face-to-face meetings supported by strategic artefacts. • PowerPoint presentations, Excel spreadsheets, visualization tools used in preparation of strategic artefacts (reports, slide decks, other documents).	**Technology enabled** • The communication between members occurs through posting and commenting on the platform in real-time. • Instant sharing of the content (including PowerPoint presentations and other documents) and ability to access this content at any time.
Rules of participation	
Restricted participation • The meetings within formal strategy-making process are scheduled in advance. • The number of participants is limited • An invitation is required.	**Open participation** • New members can join at any time. • The participation is open for all Telco's employees (with registration). • The participants' identity is visible to others (e.g. name, position, location).
Importance of expertise • Emphasis on expertise and hierarchical position of actors involved in the discussion of issue at hand.	**Importance of collective** • The emphasis on the importance of collective participation for value creation from community discussions.
Norms of interaction	
Structured events • The meetings have a clear agenda and objectives. • The interaction between participants is in real-time. • Each participant has limited time to present the information or to participate in a discussion. • The clear accountability for delivered information. • Targeted information sharing.	**Fluid interactions** • The discussed issues vary in its nature. • The interaction has an asynchronous character (members can comment on the issues discussed earlier). • Members are not limited in the amount of information to share. • Members are encouraged to share their personal opinion. • Post and comments are is visible to any member of the community.
Assignment of participants • Tasks are assigned by higher level-managers. • Building task groups based on expertise, functional and hierarchical position.	**Mobilization of participants** • Voluntary participation, use of monetary and reputational rewards. • Building community, creating a shared identity.

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[17] The description of each analytical category is provided in Sub-chapter 3.3 (Stage 2)

Conventions of language use	
Rational rhetoric • Use of facts, numbers and strategic frameworks ("heat maps", matrixes, graphs) to explain the market situation or demonstrate the potential risks and opportunities. • Use of trusted and respected sources of information.	**Affective rhetoric** • Use of metaphors, personal reflections. • References to personal feelings and experiences.
Reducing uncertainty • Issue management starts from a problem statement/assignment. • The goal is to provide objective insights with a clear set of options or follow up steps for decision-making. • A structured approach to problem-solving, use of established strategic tools and methods.	**Navigating ambiguity** • The issue or question is not precise and concrete. • The goal is to share multiple perspectives (personal opinions) on the topic at hand for identifying relevant strategic questions. • The use of novel tools and methods is encouraged.

The formal strategizing process in Telco was enacted through meetings, where possible face-to-face, or via video-conferencing. In preparation for the meetings PowerPoint presentations, Excel spreadsheets, as well as written reports were used to analyse, calculate, visualize or share the information that was relevant for the considered topics during the meeting. For instance, in the context of the annual Strategy Conference – an event for coordination of strategic priorities between Telco's subunits - each BU prepared their strategic objectives for the upcoming time horizon in a format of a PowerPoint presentation. These presentations were crafted in coordination between multiple strategists and were shared prior to the formal meeting to ensure a level of consistency among presentations. In contrast, communications within the SP community occurred online in the virtual space. Community members communicated by publishing posts and comments. Such way of interactions allowed asynchronous communication as community members could always take time before publishing new content or could go back to the discussed topics and add new insights. Community members also would receive notifications when new posts or comments appeared on the platform. In such a way online collaboration also provided an opportunity to stay up to date to the ongoing community discussions. As one of the community leaders described it:

> *"The old saying that something magic happens when people meet is true. However, if there is one criticism to traditional conferences is the limited time for reflections and questions....and the amounts of PowerPoints... The opportunity we have today to step back, reflect, articulate a new thought or insight and connect again is simply fantastic".*

Hence, in the case of formal strategy-making actors used technology to facilitate communications and enable the creation of strategic artefacts however such use was

limited and combined with traditional forms of communications. While in the context of online community communications, technology played a much more central role as it *enabled* interactions among multiple actors who were geographically and temporarily dispersed. Hence, communication without technology among these actors would be impossible.

From the perspective of participation rules, the two processes also diverge. The participation in the Strategy Conference, for instance, would be limited to the individuals and teams working with strategy development in various parts of the organization (BUs, MAs or GFs). Hence, only individuals who had received an invitation could attend the meeting, see the agenda or know who the other invited participants are. Further, information shared in the context of this meeting would usually be only circulated among the attendees of the Conference or other authorized individuals. In contrast, participation in the online community was much more inclusive as the SP was open to all employees within Telco regardless of their functional or hierarchical background. Besides that, the sharing of the information published on the platform was welcomed by community leaders as it complied with the idea of the openness and diversity of strategic perspectives. Such openness allowed to create new connections between members who never worked together previously. As one of the community leaders described the community:

"[The] Strategy Perspectives [community] is clearly a unique animal within Telco. It's a diverse community that continues to grow, it's an inclusive area where everyone is able to reflect and collaborate around areas that affect us all".

Hence, the participation in the formal process of strategy-making was *restricted*, while participation in the online community was much more *open* and inclusive, and allowed diverse organizational actors to join strategic conversations. Another difference in rules of participation related to the emphasis on the participant expertise. In the formal strategy-making process strategists often emphasize the importance of the *expertise* and the hierarchical position of actors involved in the discussion of strategic issues. For instance, in their interviews strategists repeatedly mentioned that work with strategic issues will usually involve consultation with experts within or outside Telco. Further, it will also require the involvement of relevant decision-makers or resource owners, hence defining relevant actors is "*a very important exercise to do*". From the community side, greater emphasis was placed on the diversity of functional and personal backgrounds that could provide multiple perspectives on the

discussed topics and therefore novel and unconventional ideas. Hence, the *collective* participation in the production of insights was emphasized in community principles:

""Coming together is the beginning. Keeping together is progress. Working together is success". The quote from Henry Ford is beautiful. It mirrors so perfectly the journey we need to make as a community".

Also, the norms of interactions within two organizational processes were different. The formal process of strategy-making had a much more *structured* character. For instance, the scheduled face-to-face meetings would usually have a clear agenda, limited time frame, and prescribed list of presenters. Strategy Conference meeting, would take an entire working day and be moderated by a group of professional strategists. The content of the presentations, presenters, the sequence of presentations as well as follow-up discussion questions were planned in advance. The SP community, in contrast, had a much more *fluid* style of interactions. Community members were able to join the conversation of their interest at any convenient moment. Also, they would not be limited in time or space for sharing information (the number of posts and comments, the moment of publication) and even were encouraged to provide extended blog posts with elaborated reasoning behind their ideas or thoughts:

"We [community leaders] really wanted to empower them [Telco's employees], to get them more active, instead of just producing PowerPoints. It's important to articulate a point of view, it is all about conversations".

Another point of divergence was the mobilization of engagement. In the framework of the formal strategy-making actors interacted based on their expertise or functional and hierarchical position. Hence, formal responsibility and specialization of individuals would define their level of engagement in the discussion around a particular issue. Further, the assignments related to different strategic questions would usually be induced top-down, professional strategists would be tasked with a broad issue such as *"we need a strategy on security"*; that will further be divided into smaller sub-tasks and directed to relevant teams or individuals. While in the context of the online community the functional and hierarchical background had less relevance for members' engagement. Participation in community discussions was voluntary and based on personal interest or passion. Moreover, community members were encouraged to propose their own themes or new discussion topics. Finally, community leaders put a lot of effort in building a community identity of "strategic thinkers" or "thought leaders" by providing reputational and monetary rewards for a high level of

engagement and provision of good quality analysis. Hence, in the formal process of strategizing the relevant actors were *assigned* to work with a particular strategic issue based on their functional or hierarchical characteristics, while in the online community voluntary participation of members with a personal interest in the discussed strategic issues was *mobilized.* As one of the community leaders emphasized in the post describing community principles:

> *"We are more than titles given to us. We are more than the tasks we are given to do by others. We think strategically - see the bigger picture, seek connections, but more importantly, we are curious to understand why and dig deeper".*

Next, the analysis also revealed the differences in conventions of the language used in formal strategy-making and online community. First, expectedly, in the context of formal strategy communications, the use of *rational* rhetoric was prevailing. During the interviews, professional strategists emphasized the importance of fact-based data obtained from the trusted sources of information, often field experts, respectable consulting and research agencies. Furthermore, strategic documents often contained financial or market data, comparison tables, matrixes or forecast graphs that adhere to the rational type of argumentation. While communications in the context of the online community were more reflective and *emotional*. To deal with the complex issues that were often discussed on the forum, community leaders employed metaphors to prompt the discussion through analogous thinking. In the discussion on risk-taking, for example, the community leader used the following metaphor:

> *"I guess we are a "we rather miss the boat" company "we may have missed a whole armada over the years", but on the other hand, we have survived for 137 years. One can argue that we have actually strategically "jumped ships a few times" during that period, most famously when we bet on mobile phones (but as I was told the story it was more like a mutiny than a deliberate order from the captain)".*

In addition, community leaders often referred to their personal experiences and emotions in relation to the topic of discussion. The emotional appeal aimed at increasing the engagement of community members by differentiating the communication from the formal type of communications. In addition, sharing of personal thoughts also generated a sense of transparency and trust.

The final difference between formal strategy-making and online community collaboration referred to dealing with ambiguity. In the context of formal strategy-making, a great emphasis was placed at *uncertainty reduction*. Hence, by analysing objective data the strategists' aimed to provide a set of clear statements, options for

further decision-making or strategic questions for further analysis. While in the SP community the ongoing sharing of insights and various perspectives was aimed at the identification of the questions that are worth further discussion and elaboration. As one of the first posts on the platform stated:

> *"Framing the right questions is key to rich conversations within a robust, diverse community. By posing questions, we are inviting others to amplify and elaborate on them rather than to find ways to answer them".*

Hence, online community discussions often clearly acknowledged the ambiguity of strategic issues. However, instead of searching for a set of solutions, the SP community aimed at *navigating ambiguity* by identifying new insights and posing further questions to build deeper understanding and orient its members in the context of high uncertainty.

These identified distinct characteristic of formal strategy-making and online community collaboration are to some extent expected and perhaps not particularly surprising. However, the juxtaposition of the various communicative practices allows demonstrating the fundamental differences in the two types of organizational processes. Moreover, the divide between those processes cannot be easily reconciled as it will change these processes' nature. Hence, the analysis further demonstrates the need for bridging between formal strategy-making and online collaboration for translation and transition of information between the two.

5.3 Bridging online community and formal strategy-making communicative practices

As demonstrated in the previous chapter the online community and formal strategy-making deviated substantially in the applied communicative practices and tactics as well as in the type of audience participating in each process. Yet, the ultimate goal of the SP community was to create an impact on the organizational strategy through the knowledge and insights emerging through online discussions. Hence, community leaders sought for those ideas to reach the strategic agenda of Telco. To achieve that community leaders tried to integrate activities of online communities with the formal strategy-making process. As one of the senior strategists explained the chasm between two processes:

> "*The way that the SP works, it attracts people who are not working in strategy but who are strategic thinkers. Which means they have no clue what the formal process looks like and they provide a completely new perspective, which is a good thing. The bad*

thing is that they're not part of the formal strategy collective, so the formal strategy people don't see a necessity to engage directly. So we tried to somehow manage this, to help these people who really wanted to affect things or who were upset or really passionate about something, so they can actually add value, because that's, in the end, I believe [what] everybody wants to do".

To bridge the two processes community leaders were continuously engaging in various practices that were aimed at two types of audience - senior management and community members. These practices were broadly related to three bridging mechanisms. First, community leaders skilfully used language utilized in formal strategy-making in the content of online discussions, while combining it with less formal style of communication that allowed for free-flowing discussion based on personal interpretations. Secondly, community leaders skilfully utilized practices that enabled a degree of structure in engagement of online community members while concurrently allowed for fluid and inclusive collaboration. Finally, community leaders engaged in activities aimed at legitimating the online collaboration process as appropriate and beneficial to both, community members and Telco in general. The following sub-chapters will describe each group of practices constituting bridging mechanisms and will provide empirical evidence to illustrate them (Tables 6, 7, 8).

5.3.1 Bidirectional framing with strategic concepts

The general strategy discourse of Telco often utilized various strategic concepts such as "networked society", "digital transformation", "disruption", and "growth strategy". Although senior management frequently used these strategic concepts in external and internal communications, their meaning remained highly ambiguous as these were used in multiple contexts. Hence, community managers skilfully selected commonly used strategic concepts and instigated discussions around them. Some of the initial posts, for instance, focused on the understanding of Networked Society and its meaning specified in the context of the telecommunication industry. Such discussions generated multiple comments and questions that often touched upon different but related themes. The topics of alternative organizational structures, corporate culture, business models and digitalization were related to the discussion around the demands that a Networked Society places on Telco. However, senior management was not actively involved in the online discussion and hence was not exposed to the multiple interpretations of the Networked Society characteristics and implications for Telco. Therefore, to communicate the generated insights to senior managers community

leaders produced concise and coherent strategy narratives that were summarized in the form of reports, PowerPoint presentations or papers. For instance, the discussion around the Networked Society was generated into a paper titled "More of the same is not enough". The concept of the Networked Society resonating with the discussion of senior managers was central to the paper, yet the content of the paper represented the synthesis of insights generated in the SP community.

However, to move from the single concept to multiple interpretations that could be summarized in an articulated coherent narrative, community leaders engaged in four underlying practices that are discussed below: *making sense of strategic themes with resonance, boundary setting for strategic discussions, synchronous and asynchronous coupling, and narrative synthesis (see below)*. Table 6 provides additional evidence for each bridging practice[18].

Making sense of strategic themes with resonance. Community leaders were dedicated to making discussions unfolding online more relevant for senior management. The structural position of community leaders as strategy professionals allowed them formally and informally to engage with members of the TMT and therefore be informed about the strategy discourse ongoing in Telco. For instance, strategy professionals were involved in the preparation of strategy-making forums such as the annual Leadership Summit – a "*meeting with a broad group of Telco's upper management to refine and anchor the future direction for the company*", and the Strategy Council - regular monthly cross-organizational meetings "*for discussion of gross-group strategic issues*". Additionally, being professional strategists community leaders were involved in various assignments related to the work with strategic issues. On top of that, they scrutinized the public communications of senior managers too. For instance, Telco's CEO or head of BUs held a number of public speeches at various external forums such as the Mobile World Congress or the World Economic Forum. Internally the CEO and other members of TMT had regular weekly or monthly communications addressed to all employees. This allowed community leaders to stay up-to-date with the latest developments of Telco's strategic direction and ongoing challenges that the company faced and acknowledged. Thus, community leaders used available information to make sense of the strategic issues and questions relevant to

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[18] Table 6 is provided at the end of the section 5.3.1

senior managers. Further, they interpreted the issues indicated in TMT communications and induced them in the community discussion. For instance, in his interview one of the community leaders explained how he started the discussion about the growth strategy (a term frequently used by senior managers) by introducing the concept of "problem-solving":

"We needed to provide the guiding star rather than prompt clear answers, to make people think in the right direction. Then I came up with things like … it's not the solution to grow, because growth comes up when you solve someone else's problem. So, what are the problems for others that Telco could solve in order to create value".

The interpretations of strategic issues and skilful use of related strategic concepts allowed community leaders to prompt online discussion on the topics resonating with senior management.

Boundary setting for strategic discussions. Besides the consideration of strategic issues that resonate with the TMT, use of strategic concepts allowed community leaders to define boundaries around the discussions within the SP community. Although community members were free to share the insights and analytical pieces of information aligned with their personal interests, the ambition of community leaders was to collect enough contributions to the relevant strategic topics. Hence, to achieve that strategic concepts were frequently utilized in the titles of the posts and monthly themes. Use of strategic concepts enabled the creation of a shared discussion space with permeable boundaries where multiple members of the SP community could collectively contribute while still having the freedom to provide perspectives substantiated by their diverse expertise and backgrounds. For instance, in May 2018 community leaders used the 'growth strategy' concept as bounding theme for upcoming online conversation:

"*We will kick-off the month with a focus on growth. As many of you might know, we are running a growth project in one of our BUs involving the whole company. It is still in an early phase where we are exploring ideas and opportunities for growth beyond 2020*".

Beyond the inducement of strategic concepts as discussion topics, community leaders used strategic concepts in multiple questions addressed to the community in order to navigate the discussion and keep it close to the selected strategic themes and issues. Hence, the goal was not simply to crowdsource various ideas about a particular question, but create a more holistic meaning of strategic concepts relevant to the

discussion. For instance, to prompt discussion around the 'growth strategy', multiple questions aimed at creating a deeper understanding of the concept at hand were posted:

"So, how can we approach this topic, Growth? We will, during this month, dig into "growth" as a term, and find out what would define growth in this context. One aspect is that we are looking for growth beyond the "obvious" areas, while still looking for opportunities within that are reachable. We shall explore this and related aspects further during the month – but don't wait for a lead-in, air your thoughts! Growth Strategy? What would characterize a Growth Strategy? And to what extent would we apply the "classic" strategy management, and how will the notion of an "open strategy" complement any classic approach?".

Therefore, strategic concepts were used as boundary spanning objects enabling collaborative sense-making, but at the same time marking the discussion boundaries.

Synchronous and asynchronous coupling of strategic concepts*.* The discussions around strategic themes usually would generate multiple strategic concepts. The posts from community leaders themselves often contained initial interpretations of strategic concepts that were further enhanced through comments of community members. The professional knowledge and skills of community leaders as strategists enabled these processes and skilfully combined multiple strategic concepts. They did so within the discussion around one strategic theme (synchronous) or they were combining strategic concepts discussed over a period of time in the frameworks of multiple themes (asynchronous). For instance, in continuation of conversation around 'growth strategy', the number of reactions allowed community leaders to link several strategy concepts like "innovation" as a source of growth, and "innovation incentives" as a way to boost innovation within Telco. That led to the concept of "inclusiveness" as a great incentive for innovation. As one of the posts demonstrated there is a sequential connecting of several strategic concepts:

"I think it is not only about finding the "magic beans" [new areas] *for growth. We need also the soil where the magic beans will sprout, and where they will continue to grow high up into the magic kingdom. …There is no growth without innovation… The other key question then becomes, how do we go about incentives for innovation…. Talking with a colleague working with innovation he pointed out how critical inclusiveness is for motivating people…".*

The asynchronous coupling allowed community leaders to "*connect the dots*" between various overarching themes of discussions unfolding over time; for instance, the concept of "corporate culture" was raised in many discussions occurring online in

connection to "digital transformation" – the need for a different mindset; "innovation" – the need for different incentives; "business models" - the need for different evaluation criteria; and "customers" – the need for different principles of working with customers. Hence, all these discussions pointed out the inevitability of cultural change for surviving in the dynamic environment of the telecommunication industry. Seeing the relevance of 'corporate culture' in relation to many other strategic concepts, community leaders have decided to start a new discussion theme around "culture change" where members were suggested to think about "shocking culture rules" (Taylor, 2019) - memorable rituals and practices that express the strategic values of an organization and that people inside the organization encounter daily:

> *"Unsurprisingly, culture has in fact been a major item of discussion since the start of our Strategy Perspectives community. Remember, "culture eats strategy for breakfast"…So, what should be Telco's shocking rule?".*

The coupling of multiple strategic concepts enabled the integration of different meanings created by SP members, but still around strategic themes relevant to Telco's general strategic discourse.

Synthesising of strategic narrative. Finally, to achieve the impact, the SP community discussions triggered around strategic concepts relevant for senior management and integrated with multiple meanings suggested by community members, had to feed back to the formal strategy-making process. As senior management often lacked time to engage in online conversations or follow lengthy discussions, it was crucial to provide them with the most relevant strategic insights in a concise and well-articulated manner. Hence, community leaders synthesized multiple conversations into a coherent strategic narrative. To achieve higher resemblance with senior managers community leaders utilized structures for strategic narratives similar to structures used in the formal strategy-making process where the argument starts from a clear problem statement, followed by placing the problem in the greater context of Telco, followed by provision of some form of systematic analysis and concluded with clear action points or follow up steps. Figure 10 depicts two first slides from the PowerPoint presentation on the topic of Business Models. For instance, the strategic narrative about the business model started from problematizing the topic: "*We need to find another way to set up our business models, given the fact that operator top-line and spending growth will be challenged going forward*". Next, the

document contextualized the importance of the update of business models by providing an explanation of how business models of operators (main Telco's customers) will affect Telco's growth. Further, the document provided an in-depth analysis of current business models utilized by Telco. Finally, the document concluded with a number of statements like: "*Digital Business Transformation means non-linear thinking and exponential business opportunities/growth. Operators are weak in business model innovation, both a threat and opportunity for us.*" Also, a set of follow-up steps suggested a further in-depth analysis of concrete areas.
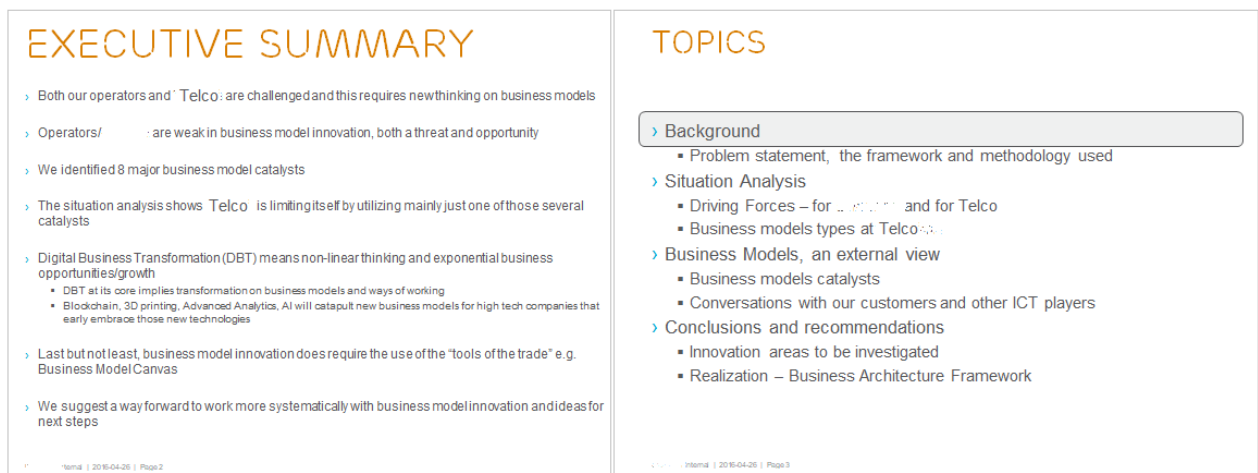
Figure 10. The slides from the PowerPoint presentation on Business Models for Telco

Synthesizing the strategic narrative allowed to transform extensive and diverse conversations occurring online in a random sequence into clear and concise content resonating with the general strategy discourse of organization.

Table 6. Bidirectional framing with strategic concepts: Selected Evidence

Second-order codes	Selected Evidence on First-Order Codes (IN – interview; E – email; FO – field observations, CL – community log, SD – secondary documents, SA-strategic artefacts)
Making sense of strategic themes with resonance Continuous identifying and interpreting strategic issues relevant for senior management through formal and informal communications	*Making note of issue of incentives mentioned by Head of Innovation* [Informal meeting between community leaders]: "*Met with our new head of innovation and he needs our help with "incentives" for innovation. He is concerned with incentives that ensure the next big idea does not leave the company. I have been thinking about that…*" (FO) *Reading regular CEO internal letters to understand his point of view* [CEO letter May 2017]: "W*e are playing the long game to secure our future. The first part of that game is to turn around this company and that will come in the next 12-18 months. Step-by-step we need to secure gradual improvements in our business. And we will act fast now, to make that happen. …. Together we, you and I and everybody else, will make this turnaround.*" (SD) [Community leader's post on company turnaround]: "*I have read everything that can be read about turnaround and companies facing intensive competitive threats….Company turnarounds are remarkably*"

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	similar to the football scene. One key take away from all successful turnaround stories, including our own, is around the "psychology", or how critical the soft aspects are. The belief, motivation, inspiration, energy all need to be there in the minds and hearts of its people… what our CEO is saying we - only we - can win this, inch by inch." (CL)
Boundary setting for strategic discussions Demarcating boundaries around particular discussion themes through the use of strategic concepts	<u>Using strategic concepts as Topic of the Month</u> [The topic of the Month February 2017 entitled "Strategizing for Business Model Renewal]: "*There is no question about the importance of new business models that come with digital transformation. Companies increasingly realize the need to find new ways to create value for the customers and to identify new approaches for generating revenue from the created value…. So, how can we deal with business model renewal paradoxes?*". (CL) <u>Posing questions around strategic concepts</u> [Discussion about the role of Telco in the Networked Society]: "*By posing questions, we are inviting others to amplify and elaborate on them rather than to find ways to answer them….What's orchestration in the networked society? Is orchestration different from systems integration? How do we earn the right to orchestrate the networked society? What new capabilities are required to orchestrate? What core partnerships are necessary to orchestrate?*" (CL)
Synchronous and asynchronous coupling of strategic concepts Combining two or more strategic concepts within the boundaries of one discussion (within one topic of the month) Combining two or more strategic concepts from distinct discussions (from different topics of the month)	<u>Using multiple strategic concepts in posts and comments (synchronous coupling)</u> [Post on IoT (Internet of Things) monetazation]: "*From our perspective, there are some Key Questions that we especially would like to discuss with everyone during this month topic of the month. What is Telco's Value Proposition for IoT?* [value proposition] *What is Telco's Business and Strategy Model for IoT?* [business model] *What is the target market area for Telco (beyond the operators)?* [target market] *In which industries is Telco significantly positioned and established to compete within the IoT market?* [competitive position] *Who will be our true customers?* [target customer]. [Responses to the post]: "*I believe that partnerships will be an important aspect of our IoT Strategy and we have to work in a coordinated way with Partners*" [strategic partnership], "*In our "new" marketing slide deck of IoT I saw the word servicetization*" [servicetization], "*When we talk about monetization - a Key thing that we actually provide to the larger IoT eco-system is the BOBO capability - Ie the Billing of Behalf of*" [core capability], "*A more constructive approach would be to become obsessed by understanding the problem we are trying to solve*" [pain points], "*Our strategy is probably to provide the environment/platform*" [platform as a service], "*Silly Question, Don't we need our own IoT device? that can connect to just anything in this world?*" [device as a service] (CL) <u>Referring to previous posts and discussions (asynchronous coupling)</u> [Discussion on Growth Strategy]: "*Actually, it is not correct to state that this is "the starting point for us at Strategy Perspectives" on this topic. Just look back at the previous Topics of the Month. April was "Quantum", which is an enabler to solve Problems Worth Solving (and Quantum will likely also create a few new Problems To Solve...) The month before that we had The Science of Emerging Business, which also is a key part of a growth strategy. Not to mention all the months and posts before that*". (CL)
Synthesising of strategic narrative Incorporating multiple arguments into coherent narrative resembling	<u>Creation of strategic artefacts such as PowerPoint, papers, reports</u> The summarized discussions of Strategy Perspectives were synthesized in the format papers (Word, PDF) or presentations (PowerPoint). Some strategic narratives were synthesized in multiple formats (e.g. 'More of the Same is not enough', 'Renewed Interest in Satellites') (FO, SD)

structure of strategic documents	*Formulating a coherent strategic narrative* [From the analysis of 8 strategic artefacts[19]]: Each strategic artefact had similar structure consisting of the following elements: problematizing (formulating the problem statement), rationalizing (providing relevant context), tailoring (looking at implications for Telco), proposing (making suggestions for further analysis or actions) (SA)

5.3.2 Bidirectional structuring of communications

The divergence between formal strategy-making and online community collaboration processes was further enhanced through the use of distinct practices. In the context of the formal strategy-making process, professional strategists and other organizational actors utilized practices institutionalized within Telco. While engagement and approach to knowledge production in the SP community did not adhere to the established norms of strategy-making. First, everyone could join the conversation, the relevant background was not a determinant for participation. Engaged members oftentimes were not professional strategists and therefore were not familiar with the practices utilized in the work with strategic issues. As Head of the Strategy Group noted in one of the interviews:

"I think it [the SP community] is very useful. I think we have to be a bit modernized in our ways of working but we also have to learn how to do it. It is and should be a good tool to complement what we are doing overall. But it's a little bit ... living on the side not fully anchored [to the formal strategy process]".

Therefore, community leaders had to bridge the practices utilized in the formal strategy-making, while also allow participants to freely engage in the online discussions. To achieve that community leaders utilized a number of practices: *staging issue-selling, mobilizing contributions to strategic themes, matching strategic themes with community interests, performing issue-selling (see below).* These practices enabled structuring attention and activities of community members to utilize their knowledge, expertise and passion in a more focused way while ensuring a higher level of attention from the senior management. Table 7 provides additional evidence for each bridging practice[20].

Staging issue-selling. Staging of issue-selling was the process that took place far before the actual issue-selling. Hence, to 'sell' insights generated on the platform to

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[19] The analysed strategic artefacts correspond to the 8 strategic initiatives described in Sub-chapter 4.3 (Table 4)

[20] Table 7 is provided at the end of the section 5.3.2

senior management later, community leaders proactively took actions to ensure the credibility of produced insights. Community leaders selectively invited internal Telco experts or sometimes external experts to contribute to a particular discussion. This not only increased quality of the discussion as experts could provide informed opinions, moderate discussion or answer topic related questions, but later it also allowed to make claims about the quality of generated insights. For instance, during the preparation for the discussion around emerging business, community leaders were inspired to invite individuals who were involved in managing new businesses in previous years but who already left Telco. As one of the community leaders explained during the backstage meeting:

> *"We should invite Michael [former director of New Business Development & Innovation in Telco] and Hans [former Vice-President of New Business Development and Innovation] to share their experiences from the past. But we also need of course to deliver really good posts/story"[21].*

In addition, community leaders were mindful about the 'end-user' of the produced insights. These considerations were important not only for understanding the interests and the strategic issues relevant for a particular senior manager or group of senior managers, but it allowed to think about format and channels through which target audience could be reached. One of the examples of such staging practice was the discussion around the issue-selling 'target' for the theme of emerging business. As the new head of BU was recently appointed, community leaders saw a great potential for her to learn about past and current developments around emerging businesses in Telco. The short excerpt from emails exchange between community leaders emphasizes how considered they were about preparing the suitable content:

> *"Remember, the new head of BU comes from a consulting background, so we would need to offer something really well structured, sharp and that not even McKinsey can do…"*

The issue-selling staging enabled community leaders to prepare online community discussion for the higher alignment with interests of the senior management and appropriate for the formal strategy-making format.

Matching strategic themes with community interests. As the SP online community was an open space were members contribute voluntarily, the interests and passion of

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[21] In this thesis the names used in the quotes are fictional to ensure confidentiality of participants and individuals mentioned in the quotes.

community members was an important source of insights. Hence, community leaders closely followed discussions and comments occurring online to recognize new themes for discussion. For instance, the discussion on IoT (Internet of Things) monetization spurred a number of comments from other community members interested in various technologies such as blockchain and radio. Community leaders forwarded the post to other community members who earlier posted around these technologies (e.g. blockchain) and hence were interested in this topic. This allowed attracting more members who might be not particularly interested in the initial topic of discussion (IoT monetization) but are passionate about themes related to these topics.

Further, community leaders were continuously assessing the new emerging topics from the posts of community members for their broader relevance for the Telco strategic conversations ongoing in the formal strategy-making process. As the excerpt from the email between community leaders demonstrate:

"I think Jan's post/idea [Telco potential in data brokering] could possibly be one of the challenges/next steps [in understanding IoT monetization]. It needs to be worked out into a problem statement, we would need a sponsor etc. Any thoughts?".

Additionally, to engage community members the community leaders continuously summarized and highlighted discussion occurring on the platform, mindfully emphasizing themes that could lead to the generation of relevant strategic insights. However, they particularly paid attention to the discussions that triggered reactions from the community, and encouraged community members to further elaborate and discuss them:

"October was a great month for Strategy Perspectives, and really built momentum towards the end of the year in how we collaborate as a group. A broad range of topics and some really interesting posts and comments. I will take the time to highlight a few of the topics that generated discussion".

Therefore, matching interests of community members with broader strategic themes relevant for Telco enabled ongoing open conversation around the interests of community members while seamlessly stirring them toward strategic themes relevant for Telco's senior management.

Mobilizing contributions to strategic themes. The SP community had a highly diverse membership of individuals with various professional and personal interests. Hence, the variety of discussed themes at some point became overwhelming. To direct the attention of community members on particular topics while still allowing for

inclusiveness and diversity, community leaders utilized affordances of the digital platform. The front page of the SP platform was continuously updated with the most recent discussion themes. Additionally, the front page contained an area with the core questions that community aimed to answer collaboratively. In such a manner, community leaders maintained the foci of member's attention around the strategic questions relevant for Telco. As one of the community leaders explained:

"*On the front page there is a list of the top questions defined so far and it is backed up by a wiki site where we can define and collaborate on refining these questions. It is inspired by the DSI [Driving Strategic Impact] learnings that half the job is a good problem definition*".

Also, to mobilize members for discussions, community leaders carefully crafted the posts to make them engaging, readable and linked with other posts. To stimulate a higher number of comments and reactions it was crucial to make posts relevant not only to a particular group of individuals but make it captivating for the broader community. To achieve that, prior posting community leaders were sending drafts of a post to each other to test readability and clarity of the message. Also, such crafting could happen during backstage informal meetings and email exchanges were community leaders had an opportunity to test their ideas with each other:

"*I have been thinking about that [new post about innovation initiatives]. Already discussed with John and Alice [other community leaders] and actually have some ideas… What I need from you right now - does the post read ok?*".

The practice of mobilizing contributions of community members allowed to engage multiple members with diverse expertise into online discussion in a more structured way. This also helped to focus community members attention around the strategically relevant topics.

Performing issue-selling. When topics were selected the discussions were summarized in strategic artefacts such as reports or presentations, and community leaders delivered it to the senior managers. The summarized reports and PowerPoint presentations enabled easier sharing of insights with multiple individuals. Moreover, it was common for Telco formal strategy-making process to present PowerPoint presentations during the formal and informal meetings or send pre-read materials in a form of reports. In some cases, strategic artefacts were presented in the framework of formal strategy meetings. For instance, the paper titled "More of the same is not enough" synthesized community discussions around Telco's digital transformation and

strategies required in the Networked Society. It was used as a pre-read material for an annual Strategy Conference in 2016. Hence, the paper was sent out in advance to all attendees of the event, including senior management. During the meeting, community leaders as strategy professionals also had an opportunity to present the paper as a PowerPoint presentation. This allowed to disseminate the community's insights among a great variety of senior managers such as heads of strategy from different BUs, while also receiving feedback from the audience.

In other cases, produced strategic artefacts were delivered outside of the formal strategy events. Hence, community leaders called for meetings with various organizational actors to share the insight developed online, which was a normal practice within Telco. For instance, the report titled "Renewed Interest in Satellites" was presented to the Head of Strategy and technical specialists in Telco. As one of the individuals involved in presentation explained:

"We sent the report and then we had a presentation with the head of strategy, and she, of course, had access to the entire TMT ….and she listened to us and I think she was impressed … her conclusion was that further analysis is needed... And then we also presented, it's not our CTO [Chief Technology Officer] but people reporting to CTO. So, we presented to some 20 people when it was ready, we presented to our head of sustainability…".

Therefore, the performing issue-selling enabled community-generated insights developed in an open and inclusive manner to reach senior management in the format and with the use of practices aligned with the norms of strategy-making within Telco.

Table 7. Bidirectional structuring of communication: Selected Evidence

Second-order codes	Selected Evidence on First-Order Codes (IN – interview; E – email; FO – field observations, CL – community log, SD – secondary documents, SA-strategic artefacts)
Staging issue-selling Peparing online discussion to enhance its attractiveness to potential issue-buyers	*Involving relevant experts for strategic themes* [Community member]: "*He [community leader] liked two articles I wrote, the first about human biases and the second about space and where do I see Telco in a long run, so he suggested me to be a part of the project [Space Renaissance]*". (IN) [Topic leader wrote to one of the potential contributors]: "*I'm going to be the driver of the Topic of the Month in March and we will have various discussions (and guest bloggers) on Emerging Business and how Telco deals with it. All in light of recent restructuring. We were thinking that your expertise and experience in driving new businesses would be of great value. Perhaps you could share your story as an entrepreneur with all its ups and downs, specifically in the Telco context*".(E) *Identifying potential "receiver", events, channels for the discussion outputs* [Community leader during a 'backstage' meeting]: "*By doing this the best month ever and putting the summary or blogs available to Elsa [new head of BU Emerging Business] on April 1st we may also open doors for a more f2f engagement with her….and we can of course then invite Michael and other amazing people that have been part of the topic of the month with the experiences from the past, future etc. But first, we need of course to deliver really good posts/story*".(FO)
Matching strategic themes with community interests Identifying themes resonating with the community members and emphasizing only a few topics that have relevance for broader strategic themes	*Filtering the most commented and viewed posts on the platform* The platform interface allowed for categorization of posts and its filtering. Each post could be tagged with a word or phrase identifying the affiliation with a particular theme. The filtering could be performed by the posts' tags or by the searching function that allowed to quickly see all posts containing the keywords (FO) [Community leader's post]: "*The [new] search function (with an instant showing of search results) is an excellent way to explore and retrieve posts on a given subject from our "blog" library*" (CL) *Highlighting themes that generated discussions* [Community leader's post]: *"February continued with even more engagement and activity in the Strategy Community, and I am amazed with the variety of discussions ongoing. The other day, I was listening to Ben Gilad, a guru within the field of competitive intelligence. The core of intelligence, according to Gilad, is to add perspective. And this community for sure gives different perspectives! Here are some perspectives from February..."* (CL)
Mobilizing contributions to strategic themes Stimulating community members to take collective action in discussion of a particular theme	*Assigning the discussion topics and big questions on the front page* The front page of community contained sections like 'Big Questions' – the most relevant questions of a bigger scope, 'Topic of the Month' – then-current themes for the discussion and underlying questions for the discussion. [Community leader's post]: "*Topic of the Month – This is sticky place on the front page reminding us what is the theme of the month… We think that having pinned the topic on the page we can achieve a bit more attention to this*" (FO, CL) *Careful crafting of posts to instigate higher level of engagement* [Community leader]: "*For the meeting today [list of 5 questions]. Besides overall feedback (don't hesitate sending in advance) is it too many questions? Maybe the first one is completely unnecessary as we have the answers in [experts' name] video…and the last one, maybe we get a long list of complaints?*

	1. Your view on what really ticks innovation: intrinsic or extrinsic motivators? ....5. Last but not least, also what today hinders you to innovate or de-motivates you?" (E)
Performing issue-selling Delivering strategic artefacts to senior management through various strategic channels	*Presenting one of the synthesized presentation to CTO* [Community member]: "*And when we looked at it [quantum computing as topic] and we came up with our presentation and showed it to CTO, he had asked us to create a quantum software stack. Because his view, which I also believe in, is that we are not going to create quantum chips, that's something Intel does right*". (IN) *Sending synthesized reports to the new head of the BU* [From the letter to a new head of BU]: *Dear [name of BU head], Congratulations and welcome to Telco. I would like to share with you this report produced by the Strategy Perspectives community. We got very good reactions as you can see from below and I am sure you will find it valuable. We had Emerging Business as the topic of the month in March and having in mind [being able] to provide you with insights from the past, the present and the future*". (E)

5.3.3 Gaining legitimacy of open collaboration process

As with any online community, sustainable development of SP required continuous engagement of its members and continuous in-flow of new members. The sufficient number of active members was crucial for the generation of multiple and novel strategically relevant discussions. Furthermore, community leaders were striving to institutionalize the process of online collaboration and knowledge creation, so it became an accepted way of working with strategic issues in Telco. These two aspects were further interrelated. The higher institutionalization of the SP community within Telco, could spur further growth of community membership. While a larger number of diverse membership provides greater opportunity for the generation of diverse and novel strategic insights. Hence, the legitimacy of openness was equally important for the sustainability of community membership as well as for acceptance by senior management. Community leaders were engaged in three practices to justify the SP community as a process appropriate for the strategy-making, that was attractive for participation. The 'legitimacy of openness' was achieved through the enactment of three underlying practices: *building external reputation, making relevance claims, linking with wider technological and social trends.* Table 8 provides additional evidence for each bridging practice[22].

Building external reputation. To build the reputation of the SP community, community leaders not only promoted the SP community internally, but also

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[22] Table 8 is provided at the end of the section 5.3.3

participated in various events outside Telco. Community leaders attended various conferences and conventions around topics of business intelligence, strategy and learning practices, where they shared examples and experiences of SP creation and development. In addition to that, community leaders applied for a number of best learning practice awards. In case of a successful outcome, community leaders were sharing the news internally with senior management and with community members:

"It was announced yesterday that we won a prestigious global learning award from Brandon Hall, an internationally recognized learning analyst. Strategy Perspectives won Bronze for Best Use of Social/Collaborative Learning. I think each and every one of us should be very happy for this recognition".

The external recognition of the initiative was an important source of legitimacy that community leaders used both, for attracting new members to join the SP community, and for justifying the process of online collaboration to senior management.

Linking with wider technological and social trends. The SP platform was also often characterized by community leaders as a new way of working, innovative and suitable for the trends of the digital era in which the industry operated. The new era was characterized by the requirements to develop capabilities for rapid capturing of changing market opportunities, fast innovation through collaboration and knowledge sharing and agile strategizing. Further, the digitalization of industry also afforded plenty of supporting digital tools that could enhance the quality and speed of online collaboration. Therefore, community leaders embraced the SP community as a practice that represents this new approach to collaboration and helps to break the functional silos between various functions persistent in Telco. As one of the posts stated:

"We do believe that by letting people practice strategic thinking and learning to turn information into insights we contribute to the overall transformation journey our company is undertaking....We also believe that our Strategy Perspectives community has key characteristics that can make us a winner in this digital era".

In addition, the SP community was frequently showcased as a novel practice for strategic learning that enables continuous engagement with a profound strategic question relevant to Telco's future and provision of valuable strategic insights facilitating its resolution. Community leaders demonstrated how learning is crucial in

the context of a Networked Society, a vision that Telco was following for several years (2010-2016):

"The Networked Society is the Learning Society. Learning is the process whereby we evolve and adapt successfully to reality. Through being networked, we can discern realities around us to an extent greater than ever before. Strategy Perspectives is a great way to learn and to stay networked".

Linking the new practice with the greater technological and social trends allowed to position the SP community as a timely and appropriate practice that had to be embraced within the company undergoing digital transformation.

Making relevance claims. Another way to justify an inclusive and transparent way of collaboration was achieved by gaining support from the SP members. Community leaders periodically conducted surveys asking community members for their feedback and suggestion for further development of the community. The feedback was mainly positive and community leaders used it to infer this positive image to attract members and justify its relevance to senior managers. SP members emphasized the value of engaging in an open and stimulating discussion and saw it as a great opportunity to discuss and scrutinize complex strategic issues. Community leaders used the argument about the great support from SP members as one of the impact criteria in numerous presentations. As the quote from one of the strategic artefacts demonstrates:

"Reading the comments in the survey we see repeatedly strong reinforcements on the importance of the variety of topics, the appreciation for the candid discussions and that the community cuts across multiple functions synthesized from the SP platform. This inspired us all to continue to nurture and evolve our community".

Besides comments from community members, the SP community was supported by a number of senior managers. They emphasized the value of collaboration and learning as a great capability necessary in the transformation that Telco was facing at the time. The Head of Strategy, for instance, saw the community as a great opportunity to collaboratively create valuable strategic insights as he wrote in one of his posts:

"At the end of the day, this is a race for insights and I am sure that we collectively can come up with really great stuff that will lead us forward in the way we work with strategy and lead our customers in the most dramatic change for a long time in this industry".

Making claims about the relevance of the SP platform for Telco helped community leaders in encouraging a higher level of participation from community members, while at the same time allowing greater acceptance by senior managers.

Table 8. Legitimacy of openness: Selected Evidence

Second-order codes	Selected Evidence on First-Order Codes (IN – interview; E – email; FO – field observations, CL – community log, SD – secondary documents, SA-strategic artefacts)
Building external reputation Creating a positive image and beliefs about the initiative	*Presenting initiative at professional conferences* [Community leader]: "*I was invited and presented at the Competitive & Market Intelligence Conference in Barcelona last week. The presentation was about us and entitled "Creating a Powerhouse of Insights". We had major global companies attending this conference (Shell, IBM, Dassault, etc.). One key take away is that we are doing well compared to other companies and can see ourselves as thought leaders in how we are creating/nurturing a community of practice/learners. Our presentation was well received and created a lot of admiration among the participants. As we discussed at the Strategy Conference, we should be proud!".* (CL) *Applying for best practice awards* Community leaders submitted an application and won the Bronze prize for the Best Use of Social Collaborative Learning at the Brandon Hall Group Award (recognize the best organizations that have successfully deployed programs, strategies, modalities, processes, systems, and tools that have achieved measurable results). Also, community leaders submitted application for the LernTech Conference – one of the largest in Europe events around new learning technologies that showcases the best practices. (SD)
Linking with wider technological and social trends Justifying relevance of the initiative in the current social and technological context	*Digital transformation requires new ways of collaboration* [Community leader on the relevance of SP]: *"SP is a mirror of a "Firm of the Future". We need to embrace the thoughts John Hagel [management consultant, entrepreneur, speaker and author] exposes in his video. I see more clear than ever how the many projects we drive in SP is what he calls "creation spaces". Also, that it is not about stories, but narratives and understanding that the evolution of SP is completely up to us, and open-ended".* (CL) *Strategy perspective as an example of open strategy* [Community leader]: "*Strategy Perspective is a definite success and wins many passionate supporters within the Telco community. Strategy perspective can be seen as practice of open strategy. Openness in strategy formulation offers access to novel sources of knowledge that can be deployed to solve the most perplexing problems and drive the development of new capabilities* (CL)
Making relevance claims Emphasizing the value for the organization and community members	*Demonstrating positive feedback from participants* [Feedback survey on Strategy Perspectives]: "*No other resource in Telco provides this kind of thinking stimulus"," I read as many posts as I can and use the insights and reflections", "The fact that a place like this exists has buoyed my spirits about the future of our company"* (SD) *Demonstrating support from higher management* [Interview with Chief Learning Officer]:*" It's really hard to do an effective community and actually I've seen a lot of communities fail. SP is one of the best ones I've ever seen anywhere. I actually started using it myself because there's another thing that SP does, which is a big trend today, which is curation. We're all loaded with too much information, and yes I can go and do x, y&z every day but I only have so much time. So, I see SP as a place, where smart people have curated some knowledge and discussions so that I don't have to look at everything"* (IN)

5.4 Contradictory demands for managing an online strategy community

This sub-chapter describes the findings related to the Research Question 2. Throughout the lifetime of the SP community, professional strategists were continuously faced with multiple challenges underpinning the community development. These challenges were distinct from the challenges of bridging and were much more related to the organizing of community collaboration. Although the online community is a dynamic space different from traditional hierarchical structures, the attainment of the primal objective of the SP community for strategic impact requires deliberate efforts in its organizing.

First, community leaders faced decisions around SP community design. These decisions were related to the structure of the online community and were focal for ensuring sufficient diversity of the membership without exposure of sensitive strategic information. This decision area concerned the design considerations and included participation boundaries and its permeability, and the format of community members' engagement. Next to that, the enduring growth of the SP community and sustainment of a sufficient level of engagement of its members was another decision area. Community leaders had to determine appropriate ways to motivate participation and mobilize the engagement of relevant community members. Finally, the creation of strategically relevant content was another challenge for community organizing and included decisions related to the identification of strategic themes and shaping of the discussed online content.

The three decision areas were distinct, but at the same time interdependent. Hence, the decision-making about the community structure, its growth and content shaping were complex and triggered contradictory demands. A careful balancing of multiple decisions from community leaders was required for successful organizing of the SP community. Table 9 summarizes the three decision areas and the underlying set of choices that the community leaders had to make. The undertaken decision influenced the activities of the community members. The following sub-chapters will provide a more in-depth description of each decision area and underlying choices.

Table 9. Decision areas and underlying choices for community orchestration with representative quotes from the data

	Issues to consider	Indicative quotes
Decision area: STRUCTURE OF ONLINE COMMUNITY		
Contradictory demands: Sensitivity of strategic discussion vs diverse expertise for inclusion		
Design decisions that address: ▪ Boundaries of the participation and its permeability: open access for internal members more elaborate procedures for participation of external members ▪ Format of engagement among members: a blog-based single platform, with registration mechanism to access a single community for members with a diverse background	**Internal vs external participation** Internal participation refers to the accessibility of a community content strictly to the internal organizational actors. External participation allows access for other actors external to the organization such as academics, consultants, customers etc.	From observations: access to SP platform (opportunity to read, post and comment) was open only to Telco's employees. Content from external participants was added to the platform by community members. [Internal participation] From one of the emails between strategy professionals: *"Just chatted with Magnus [external expert] and he is willing to collaborate as a guest blogger on the experience from the past and his views on Innovation and Innovation Management."* [Limited engagement with external participants]
	Type of platform (e.g. social networking vs blog-based platform). Social networking creates more noise (likes, short frequent interactions) while blog-based provides more space for articulated content. **Registration mechanism** (registration form vs open registration). Registration facilitates selection of participants with greater motivation, reducing the number of random subscribers. **Community configuration** (sub-communities vs single community) Sub-community refers to an independent group of individuals usually within a larger online community united by their interests. A single community does not contain any additional smaller groups within its boundaries and treats all participants as a part of a whole.	From an interview with community leader: *"there were two tools you could use MyNet which was a boring Yammer and then blog format right. I have hate/love relationship with Yammer, I think Yammer is like Facebook it gets to be too quick. And in MyNet it was boring, not as good as the Yammer. The idea we had is that people articulate and then we decide for a blog. So … we have got a person to create a site because I don't know anything about software, right".* [Type of platform] From observations: potential members were asked to provide their personal information (name and e-mail) and motivation to join the community and their expected benefits. [Registration mechanism] From an interview with a strategy professional: *"But it is one community right. So, it's not sub-communities, this is not like Facebook where your friends are in your subgroup and you don't care about the rest. This is very much like Twitter early ages…"* [Single community] From an interview with a strategy professional: *"You need to make a decision, either you would like to engage everyone, then you need to go with sub-communities because no one can read everything. If you have sub-communities people will not see the other sub-communities"* [Single community]
Decision area: GROWTH AND SUSTAINABILITY OF ONLINE COMMUNITY		
Contradictory demands: Diverse and autonomous participation vs participation of senior managers		
Cooperation decisions that address: ▪ Motivation for voluntary participation: a	**Monetary vs reputational incentives** In this context 'monetary' does not mean a financial reward, like a salary bonus or a cash prize, but rather an incentive in	From the announcement posts in the forum: *"It is a great honour to announce the receivers of our 'Nobel prize' The Voucher to Learn."* [Monetary] From interviews with community members: *"I mean it [participation in the discussion]*

combination of monetary and reputational incentives. Increased importance for creating incentives without active management participation ▪ Knowledge sharing across hierarchical levels: creation of "safe space" and senior management support for online community	the form of a gift that has some monetary value. Reputational incentive refers to recognition by other people of some individual characteristics or abilities.	*about bringing something to the larger community and building your reputation".* "*Yes, there were certain concrete things, like recognition was amazing, it was nice to feel recognized for what I've been contributing for".* [Reputational]
	Autonomous vs senior management participation Autonomy of participation here implies the opportunity to speak openly without fear of consequences. Senior managers participation refers to the visible engagement of senior managers in the content of community discussion.	From an interview with a community leader: *"The fine thing is that people in SP dare to write almost anything. And they don't just write anything, I mean they don't just criticise, it's a pretty restrained debate I would say."* [Autonomous participation] From an interview with a strategy professional: "*We have been working so hard with senior management and yet these people don't post much. They are influential, why can't you write anything? Completely impossible. And it comes down that they are scared to write down their opinion because then there will be on paper, that you believe that".* [Senior management participation] From the post of senior manager: "*I* [Chief Strategy Officer] *would like to mention how important it is for Telco to have a culture based on transparency and collaboration, where we learn from each other every day…. Strategy Perspectives is a great community to foster that kind of a mindset, a true best practice of cross-functional collaboration"* [Senior managers support]

Decision area: **STRATEGIC CONTENT OF ONLINE COMMUNITY**		
Contradictory demands: **Level of fragmentation vs level of strategic alignment**		
Content decisions that address: ▪ Credibility of strategic conversations: a combination of open participation with the involvement of experts ▪ Responsibility for identifying strategic topics and framing strategic discussion: involvement in the decisions about discussion topics, its content and structure.	**Emergent vs induced content** Emergent discussion refers to discussion occurring from community members' interests. Induced discussion refers to a more directed approach where topics are suggested or approved by strategy professionals.	From an interview with strategy professional: *"I always thought it [quantum computing] was science fiction. But it was [name of community member], he pushed and talked so much about Quantum. And he was so active last month, it was almost too much. I had also other people with quantum in SP. So, at some point, I said, "well maybe he's right … let's make a ToM"* [Emergent content] From the announcement post in the forum: *"Welcome to the new Topic of the Month! During May we will continue on the Digital Transformation theme and explore what it means for Supply. We plan to cover the following broad topics".* [Induced content]
	Credibility building through the participation of experts vs credibility building through a large number of members Project management refers to a more planned and controlled approach to producing community content through the engagement of members with relevant expertise.	From the interview with strategy professional: "*Open it up because you need a critical mass and you don't know who will be the "investor". Probably, someone, you didn't expect".* [Credibility building through a large number of members] From the observations: For each Topic of the Month a topic driver was assigned whose main responsibilities were to plan the posts, engage the contributors, facilitate discussion and prepare a summary post at the end of the month. During the May 2018

	A self-managed community relies on the content and initiatives of its members, which can be less systematic and strategically relevant.	topic 'Quantum computing', a top engineer within Telco specializing in quantum technologies was invited. He was actively engaged in the online conversation through own posts and comments to posts of others. Furthermore, such expert involvement created more credibility and trust as experts could facilitate and mediate a discussion by bringing his informed point of view [Credibility building through the participation of experts]

5.4.1 Managed openness for balancing inclusion and strategic sensitivity

In Telco community leaders carefully balanced the inclusion of internal organizational actors and the selected external individuals with relevant expertise. The community boundaries were regulated through the registration mechanism. Hence, to participate in SP discussion Telco's employees required to fill in a registration form. The external actors did not have direct access to the community (unless they had a temporary assignment with Telco) and their engagement was mediated by community leaders. The community leaders deliberately decided not to divide the SP into sub-communities to facilitate cross-fertilization of ideas among members with diverse background and to avoid the emergence of isolated groups concerned with specific topics. Another structural choice community leaders had to make involved the selection of the platform type. The social networking platform would provide easier participant engagement through features similar to Facebook pages ("likes", reposts, views etc.), while a blog-based platform allowed to publish full-size blog posts and therefore afforded greater focus on blog content. SP was built on a blog-based platform to allow its participants to share comprehensive, informative and thoughtfully articulated content without creating unnecessary "noise" with valueless "likes".

Initially, the SP community was instigated as a relatively small and professionally homogeneous community of professional strategists engaged in various strategy teams across Telco. However, as discussions progressed it became concerned with Telco's broader strategic issues, and more employees with diverse functional background showed interest in the community. The number of community members and their diversity grew exponentially. One of the community leaders explained this organic growth as follows:

"If you write a good article about cloud computing and have opinions about how the cloud market is developing, of course, you're going to attract people in the cloud

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department and they are going to send around this post and look what they write on the SP about the cloud".

The access to the SP required registration with Telco corporate e-mail and completion of a registration form that required provision of motivation for joining the community. Such a subscription system helped to filter the participants with lower motivation level and also created a sense of exclusivity for joined individuals. Additionally, it also allowed a higher level of control over the community boundaries. However, opening the community boundaries to the external actors triggered many debates among community leaders. Although it was conventional for members of strategy teams to engage with external experts, members of other companies or academics, the opening of the less structured and controlled online community discussion to participation beyond Telco boundaries increased the risk of sensitive information exposure. As one of the community leaders noticed:

"I usually scoff at limiting input, but the analyses and discussions we have can be sensitive. I think we have enough strategists in the company to have a diversity of thought and experience in a closed group, with the awareness for the discretion required to openly test business models and assumptions, always aiming to Telco's best".

Despite the benefit of the increased diversity of expertise that could bring relevant perspectives into the view of community members, the decision was made to only selectively include trusted experts from outside Telco. The expert's opinions usually were sought to provide more clarity into the discussion on the novel ideas and topics to reduce disagreement among discussants and to increase the credibility of conclusions. Hence, the procedures for engagement with external experts were more elaborated compared to those for Telco's employees. External experts were usually introduced as "guest bloggers" and did not have direct access to the SP platform. Therefore, community leaders or other members would represent an expert, publish provided insights on expert's behalf, and coordinate community member's questions and consequent expert's answers:

"I [Digital Transformation Senior Manager*] am posting on David's behalf and you could either comment on the same page or email me. I'll consolidate everything and send it to David* (external expert)*".*

The described decisions enabled balancing between conflicting demands of inclusivity and sensitivity. However, these decisions also had consequences for decisions in other areas. The limited inclusion of external experts precluded them from engagement with Telco's internal members and reduced direct cross-fertilization of

ideas between external and internal members. On the other hand, the transparency of contribution (non-anonymity) in combination with the targeted inclusion of highly competent external contributors increased credibility of the strategic outputs.

5.4.2 Balancing aspiration for autonomous contributions and senior management participation

As one of the SP community objectives was to create an impact on Telco's strategy, the community leaders were aspired to attract the most unconventional, novel and critical views from the community members, divergent from the organization's dominant strategic logic. The principle of non-censored collaboration for free and indiscriminate sharing also aimed at prompting community growth and members' engagement. Such an environment supposed to promote unconventional thinking and diverse strategic discussion topics and be perceived as a 'safe space' where participants with diverse expertise could become a part of the strategic conversation without fear of consequences or critique. As one of the members described:

"SP is very different because it is not politically correct. You can write almost anything you want there, as long as you have thought behind it… you don't have to have an answer, you might have the beginning of a question…if this and that is true, then maybe Telco should not go down a particular way? And then just throw it out to see what comments you have".

Additionally, to boost diversity several monetary and reputational rewards were used. Active members, frequently publishing and commenting within a particular topic, could receive vouchers for training or books or be regarded as 'topic champions'. However, despite the embrace of perspective's diversity in the SP, community leaders were aspired to engage senior managers in community discussions. The expectation was that senior managers will post relevant questions or indicate relevant strategic topics. Additionally, senior managers participation could mobilize engagement as members' diverse and autonomous opinions could be heard and consequently acted upon. Yet, senior management rarely posted in the SP community and mainly encouraged members to continue their collaboration rather than suggested themes for strategic discussions:

"I would like to mention how important it is for Telco to have a culture based on transparency and collaboration, where we learn from each other every day…. Strategy Perspectives is a great community to foster that kind of a mindset, a true best practice of cross-functional collaboration [Chief Strategy Officer]*".*

As this quote demonstrates, senior management was willing to support the SP community. However, community leaders emphasized that despite the absence of any formal policy that implies restrictions for senior management contributions, they mainly read the content and observed the activities. Hence, senior managers saw their contributions as counterproductive. This could be explained by the authority trap, the situation in which senior management opinions shared in the flow of free and speculative thinking could be perceived by community members as something definite, consequential, and substantial. Such a situation can be salient in large organizations as Telco with a high degree of consensual decision-making. The existence and significance of such authority trap were supported by the opinion of some strategy professionals:

"*It is somehow dangerous for a senior manager to say something on our platform because people might immediately perceive this as final and they must do as s/he* [Senior Manager] *says*".

"*[In uncertain and future-oriented discussions] you could easily be proven wrong and it is very awkward if you're a senior manager who's proven wrong*".

The balancing of autonomous contribution from wider members and participation of senior management was consequential in two ways. On one hand, various mobilization tactics and autonomous style of participation attracted a larger number of members and consequently higher diversity of community content. For instance, the number of topics increased in two years (from 2014 to 2016) from 182 to 500. Similarly, numbers of topic categories grew in two years from 23 to 70. At the same time, limited participation of senior management required community leaders to take responsibility for shaping the content in line with the broader strategic conversation within Telco.

5.4.3 Managing community and senior management attention with strategic framing

The continuous balancing of participation diversity and strategic sensitivity in combination with balancing autonomous participation with the involvement of senior management has affected the decisions related to the shaping of community discussions' content. The diversity of participation and discussion topics highly increased fragmentation of community discussion that was reflected in low alignment with higher-level strategic discourse. Further, limited participation of senior managers required stronger leadership in guiding themes for community discussion. The low

strategic alignment put at risk the aspiration of the SP community to create an impact on Telco's strategy.

To increase the strategic relevance of the community content, its leaders introduced several new features. As mentioned before, the monthly themes for topic discussion were introduced. The themes were suggested by community members or were selected by community leaders. In both cases, community leaders were central in making the final decision for the selection of the topic. Additionally, community leaders were members of Telco's Strategy Group and had a boundary-spanning position among multiple units of the organization. Hence, they had a great network and connection with various members and were well informed about individuals' expertise and 'pet' interests. Accordingly, community leaders would often assign members with relevant expertise or interests to contribute to a discussion. The quote from the field notes demonstrates such interaction between a community leader and member:

> *"Right now, we have Privacy as topic. It is going well but for September, we don't have anything in the pipeline. Suggestions? I thought that Company Turnarounds would be an interesting theme now. We could take knowledge from history, try to connect to Telco. Another possibility is your* [new community member] *current project on new strategy formulation processes. What do you think about that? Maybe, like we have done in our small team meeting, you first introduce your work, make a fit with the current strategic agenda and showcase some best practices."* [Observation from an internal meeting]

To maintain interest from the broader community, its leaders had to also include topics resonating with community members. As was already indicated in the previous decision area, the openness of the community and principles of uncensored conversation are important for community growth and diversity. Hence, community leaders were monitoring ongoing discussions and proactively suggested discussion topics emergent from ongoing online conversations. However, it is crucial to maintain the strategic relevance of the discussed themes. To achieve that, in conversations with potential contributors, community leaders stressed the importance of strategic alignment between strategic topics and the broader strategic discourse in Telco:

> *"We need in some way to recognize that we have a new "focused strategy"* [The new CEO clearly empathized salience of core customers, profitability and efficiency of operations in new strategy] *… and how open approach to strategy* [topic – "Open Strategy Quest"] *will help to gather input for deep dives and more long-term horizon initiatives".* [Observation from an internal meeting]

The discussions about topics often included identification of sub-topics or questions that have to be covered during the month. Community leaders often asked contributors to send their post in advance and they collectively discussed the message framing. It was mainly done for two purposes. First, to ensure the quality of the published content and the coherence and clarity of the message. Secondly, to ensure that such content provokes interest from a broader community and does not fall into a niche conversation. The excerpt below demonstrates the iteration between the topic contributor and community leader:

> Topic contributor: "*Please see attached first draft for the post. Certainly, more iterations are needed to make this post good. By now I tried to outline the main content*".
>
> Response from community leader: "*The post is too long and has a lot of ground to cover. So maybe have first a post with an intro on what we will do during the month to get people curious. Can you re-do it in two separate posts and we continue to iterate*". [Internal communication, e-mails exchange]

The shaping of community discussion had implications for two other decision areas. On one side it enabled the more structured engagement of community members as targeted invitation of the community secured continuous supply of the content. At the same time, the shaping of content ensured higher credibility of the insights developed in the SP community. The credibility was achieved by combining the contributions of selected experts with the free-flowing contributions of other community members. That allowed to achieve a higher level of strategic alignment.

Chapter 6. Discussion

The discrepancies between the nature of the formal strategy-making process and process of online community collaboration posit a great challenge for the managers responsible for organizing an online strategy community. This study aimed to understand the organizing of open strategizing within a large and established organization by answering two research questions: 1) *How do managers bridge open strategizing within an online community and formal strategy-making, characterized by closed and hierarchical decision-making?* and *2) How do managers organize an online strategy community to influence strategic decision-making in large organizations?* The two research questions were aimed to provide theoretical and practical insights related to this challenge.

The conceptualisation of findings is concluded through the presentation of two theoretical models. I start this chapter by presenting the model of bridging and theorizing the underlying mechanisms that afford co-existence between formal strategy-making and online strategy community collaboration (Sub-chapter 6.1). This theoretical model relates to the first research question. I then turn to the conceptualization of decision areas focal for organizing an online strategy community and explain their interrelatedness. This model relates to the second research question (Sub-chapter 6.2). Next, I will offer the theoretical implications of my findings for the existing research on open strategizing, strategy process and practices, and online communities (Sub-chapter 6.3). Finally, based on the discussion related to both research questions, I will explain the managerial implications and how this study can inform the practices of managers involved in the organizing of open strategizing (Sub-chapter 6.4).

6.1 Bridging mechanisms: linking co-existing organizational processes

Strategizing in online strategy communities and formal strategy-making are two processes that differ substantially (Birkinshaw, 2017; Heracleous et al., 2018) and adhere to different organizing logics (Sambamurthy and Zmud, 2000). Hence, their co-existence requires bridging (Purdy, 2009; Tracey et al., 2011; Smets et al., 2015). In addition, the absence of integration between these two approaches to strategizing raises questions regarding the influence of open strategizing on formal strategic

decision-making (Hautz et al., 2017). The emergent findings of this study revealed the importance of bridging as a concept for implementing a novel open strategizing practice within an established process of strategy-making of the large organization. *Bridging* refers to a set of online and offline activities that enable coupling between two distinct organizational processes, through the deliberate and skilful use of various practices in order to create an impact on strategic decision-making. The coupling between selected practices from two distinct organizing logics enables the creation of complementarities without full conformity to either logic. Hence, bridging affords a degree of strategic resonance between open and closed approaches, which facilitates strategic influence on the formal process of strategy-making. Building on Knight et al. (2018), strategic resonance refers to strategic insights generated through open collaboration process having greater relevance for senior managers and their follow-up actions in the formal strategy-making process. The concept of bridging entails three underlying mechanisms, namely *bidirectional framing with strategic concepts, bidirectional structuring for communications, and legitimacy of openness.* Figure 11 demonstrates this bridging process[23], explaining how strategic concepts and bidirectional attention couple two organizational processes by enabling transition between different characteristics of communicative practices (rules of participation, norms of interactions and conventions of language use) (Ocasio et al., 2018). Whilst the legitimacy of openness does not directly couple the online community and the formal process of strategy-making, it enables greater transferability of the meaning that is created and the practices utilized across the two different organizational processes. This model emphasizes the dynamic nature of bridging that is enacted through various mechanisms simultaneously and continuously.

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[23] Figure 11 is presented on the next page.

BRIDGING PROCESS

ONLINE COMMUNITY

Conventions of language use
- Affective rhetoric
- Ambiguity navigation

Rules of participation
- Open participation

Norms of interactions
- Fluid interactions

BIDIRECTIONAL FRAMING WITH STRATEGIC CONCEPTS

Boundary setting for strategic discussions

Making sense of strategic themes with resonance

Synchronous and asynchronous coupling of strategic concepts

Synthesising of strategic narrative

Target generation of multiple meanings

Holistic meaning

Higher legitimacy → Stronger demarcation of strategic concepts

Lower legitimacy → Higher need for transferability of SC

LEGITIMACY OF OPENNESS

Building external reputation

Making relevance claims

Linking with wider technological and social trends

Higher legitimacy → Demarcation of autonomous initiatives

Lower legitimacy → Structuring of communications

BIDIRECTIONAL STRUCTURING OF COMMUNICATION

Matching strategic themes with community interests

Staging issue-selling

Mobilizing contributions to strategic themes

Performing issue-selling

Selective and structured participation within community

Compliance with norms of interaction in strategy-making

Conventions of language use
- Rational rhetoric
- Uncertainty reduction

FORMAL STRATEGY PROCESS

Rules of participation
- Restricted participation
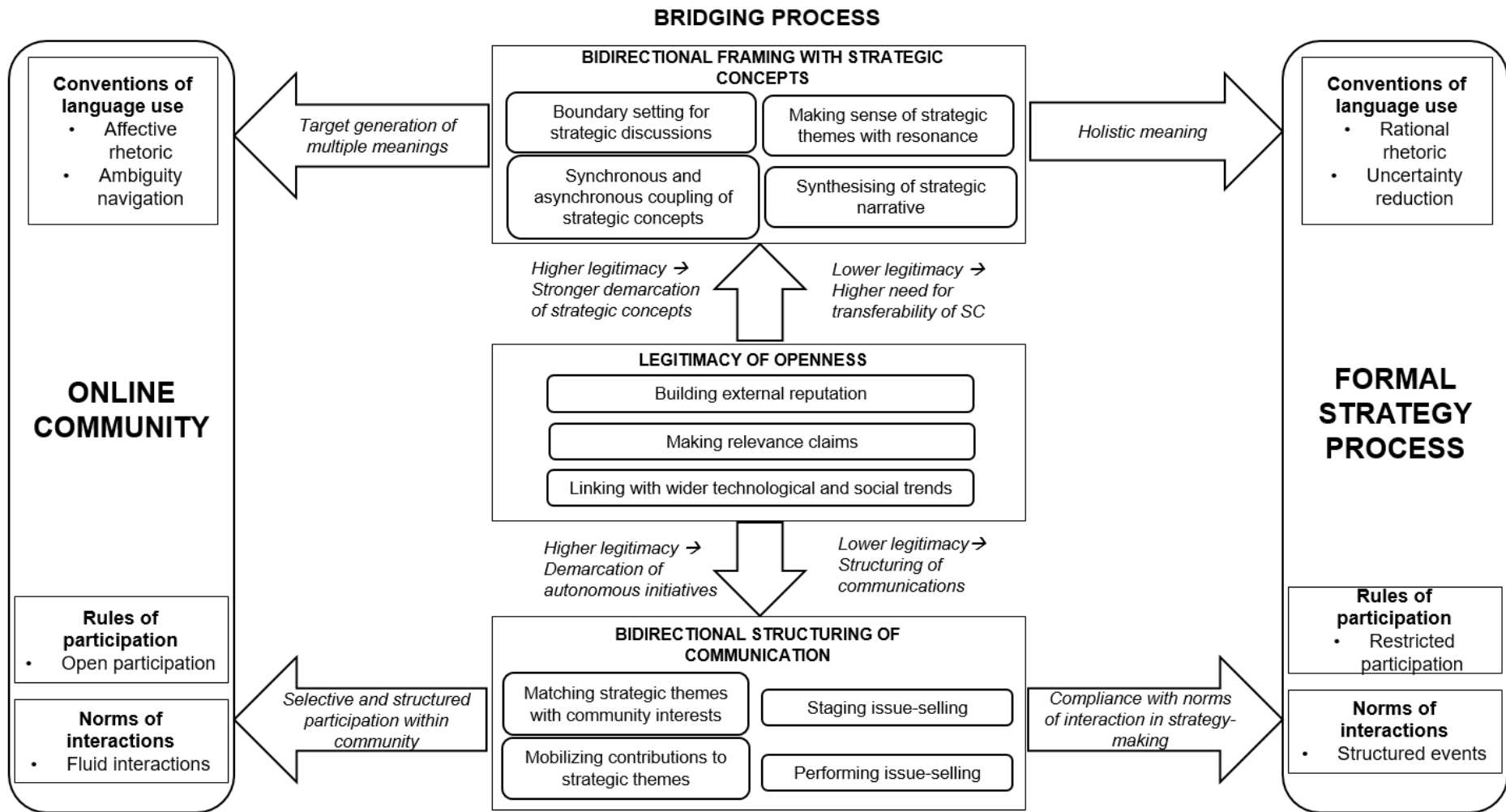
Norms of interactions
- Structured events

Figure 11. Empirically grounded theoretical model of bridging process

Strategic concepts as enablers of meaning transferability between open and formal strategy-making processes. The conventions of the language used in the process of online community collaboration and formal process of strategy-making substantially differ. In the context of community discussions, communications are often 'relaxed' in nature, compared to the communication style in the context of formal strategy-making. This effective or more emotionally-laden rhetoric (Mantere and Vaara, 2008) enabled a higher level of transparency and trust to emerge amongst community members (Jarvenpaa and Leidner, 1999). Furthermore, the use of metaphors (Heracleous and Jacobs, 2008), continuous analogous comparison with other players within the telecommunication and adjacent industries (Gavetti et al., 2005) and inductive reasoning around strategic opportunities (Cornelissen and Clarke, 2010) facilitated the generation of multiple meanings around existing strategic issues that help to navigate ambiguity. In the context of the formal strategy-making process, more rational language is preferred to understand and make sense of complex strategic issues. Rational rhetoric supported by numbers (Denis et al., 2006) or substantiated through the use of strategic tools that rationalize the process of strategy-making (Jarzabkowski and Kaplan, 2015) helps to appeal to the logic of the target audience (Suddaby and Greenwood, 2005) rather than the emotions of the target audience. Hence, formal strategy-making is predisposed towards uncertainty reduction by producing a limited set of interpretations around discussed strategic issues. The communications directed towards audiences have to evoke meaning or otherwise risk being ignored (Hardy et al., 2000). Hence, there is a distinction in the language used in online community collaboration and formal strategy-making. The use of strategic concepts enables transferability between the targeted generation of multiple meanings within the community, and the creation of holistic meaning shared by both community and senior management, which impacts strategic decision-making. The use of the bidirectional framing with strategic concepts, therefore, enables bridging between the different conventions of language use in two organizational processes.

Bridging through the use of strategic concepts was enacted in a linear manner through the performance of four practices. Initially, the skilful selection of strategic concepts from the general strategy discourse and their consequent use in the discourse of online community allowed the creation of resonance between strategic discourses ongoing in two discrete organizational processes (Seidl, 2007). Next, the

selected strategic concepts were used as boundary-setting objects (Spee and Jarzabkowski, 2009) to not only create a shared space for communication between multiple and diverse members of the online community, but also to discretely denote boundaries around the relevant strategic themes for discussions. Subsequently, the online community discussions were narrowed towards specific themes resonating with the general strategy discourse. At the same time, the ambiguous nature of strategy concepts (Seidl, 2007; Paroutis and Heracleous, 2013) enabled the generation of multiple meanings around discussed strategic issues. The further coupling (synchronous and asynchronous) implied discursive embedding of established and newly generated strategic concepts into a "family of concepts" (Jalonen et al., 2018, p. 2808) for a holistic understanding of discussed strategic issues. Consequently, the coupling of related strategic concepts eased the synthesising of coherent strategic narrative (Dalpiaz and Di Stefano, 2018) as it provided a clear set of collaboratively generated meanings and its relationships. Overall, the use of strategic concepts as a bridging practice enabled the generation of multiple meanings that consequently could be synthesized into a strategic narrative resonating with the general strategy discourse while providing additional or novel interpretations.

Bidirectional structuring of communication for coupling open and formal strategy-making practices. The low barriers of entry and fluid interactions within the online collaboration process differ substantially from the restricted participation and structured interactions of the formal strategy-making process. Although increased diversity of participating members with multiple motivations, interests and backgrounds allows for unconventional cross-collaborations and co-creation (Faraj et al., 2011; Leonardi and Vaast, 2017), a great variety of perspectives on discussed strategic issues leads to the dispersed attentional engagement of community members (Ocasio, 2011). Similarly, the free-flowing manner of fluid interactions in online communities contradicts the structured approach of formal strategy-making with institutionalized practices and established epistemic culture of strategy knowledge production (Kaplan, 2011). Although an online community may adhere to clear principles of interaction (Reischauer and Mair, 2018), knowledge creation is usually characterised by a high level of creativity (Jarvenpaa and Lang, 2011) and interplay between implicit and explicit knowledge (Nonaka, 1994). In comparison, formal strategy-making is inclined towards the systematic use of established tools

(Jarzabkowski and Kaplan, 2015) and methodologies (Spee and Jarzabkowski, 2009; Jarratt and Stiles, 2010) for gathering and analysing strategic information. As a result, the interactions in the context of online collaboration deviate from the conventional "rules of the game" that shape attentional structures of senior managers for attending to strategic issues (Ocasio, 1997, p.196). Successful influence on formal strategy-making requires an understanding of the strategic issue management process in the context of a particular organization and familiarity with relevant strategy forums and decision-makers (Rouleau and Balogun, 2011) as well as an understanding of appropriate issue-selling strategies (Dutton et al., 2001). The difference in communicative practices between formal strategy-making and online community collaboration may create incongruity in attentional focus of community members and senior managers. This will therefore require the creation a degree of commonality in attentional engagement and attentional structures between the two organizational processes (Ocasio, 2011). Bidirectional structuring for communication enables reciprocal transitions between the creation of selective and structured participation within the community, and compliance with norms of interactions in the formal strategy-making process, which helps to influence strategic decision-making. Bidirectional structuring of communication, therefore, alleviates the transition between the rules of participation and norms of engagement as utilized in two different approaches to strategizing.

The mechanism of bidirectional structuring of communication is enacted through four bridging practices. The issue-selling staging allows provisional identification of potential issue-buyers that helps to set up the appropriate context or relevant background for online discussion (Rouleau and Balogun, 2011). Additionally, issue-selling staging includes identification of individuals relevant for the discussion of a particular strategic-issue that ensures a higher level of credibility for the content generated through online community collaboration (Dutton and Ashford, 1993). Next, knowledge matching is enabled by matching between the interests of community members and strategic themes discussed in the formal strategy-making process (Haas et al., 2015; Lakemond et al., 2016). This practice creates alignment between the attentional focus of community members (Ocasio, 1997) and strategic issues relevant for senior managers, while simultaneously allowing individual members of the community to contribute to the discussion with topics they are passionate about (Faraj et al., 2011). Additionally, the bridging practice of mobilization around strategically

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relevant themes increases the level of engagement of diverse online community members, but in a more structured way. Formulation of broad strategic themes and questions that can be informed by multiple perspectives and remain aligned with larger strategic issues of the organization enables the goal-directed generative capacity of the online community (Jarvenpaa and Lang, 2011). Finally, the more structured engagement of community members alleviates the consequent process of issue-selling (Dutton et al., 2001). The degree of alignment with institutionalized-within-organization practices (Jarzabkowski, 2003), utilization of existing strategic culture toolkits (Swidler et al., 1986), and preparation of strategic artefacts (Jarzabkowski et al., 2013) in accepted formats for strategic issue-selling creates compliance with the existing epistemic culture of strategy-making (Kaplan, 2011) and conventions of strategy communication (Yates and Orlikowski, 1992). Therefore, the bidirectional structuring for communication enables bridging between different rules of participation and norms of interaction that characterise open and closed approaches to strategizing. Unlike the previous mechanism, where the enactment pattern of bridging practices is linear, practices enabling bidirectional structuring of communication appear concurrently.

Legitimacy of openness for enabling meaning transferability and practice coupling. Open strategizing practices are not widely institutionalized across organizations (Whittington, 2019) and hence the level of their diffusion as strategy-making practices is relatively low (Ansari et al., 2010). The implementation of open strategy through the instigation of an online strategy community can be considered as managerial innovation that has the potential to bring major changes to other organizational processes, and therefore requires acceptance by organizational actors (Birkinshaw, 2008). It is therefore critical for the novel initiative of open strategizing to be legitimated. The findings of this study clearly demonstrated the presence of legitimation activities enacted by community leaders. The mechanism of the legitimacy of openness does not directly facilitate bridging between different characteristics of formal strategy-making and process of online community collaboration. Nonetheless, this mechanism is fundamental for enabling the other bridging mechanisms, and therefore for achieving strategic influence. Further, I theorize the relationships between different levels of legitimacy and the salience of different bridging practices.

In the context of this study, legitimacy refers to the degree of diffusion of novel open practice across organizations (Ansari et al., 2010) and level of institutionalization within an organization (Jarzabkowski, 2008). Lower levels of legitimacy will require more forceful bridging through framing with strategic concepts and structuring of communication. The better transferability of meaning between processes of community collaboration and formal strategy-making requires the use of strategic concepts resonating with formal strategy-making discourse, restricted boundaries for online community conversations, limitations in the number of coupled strategic concepts and finally an effective synthesis of multiple meanings into a holistic strategic narrative. Hence, a low legitimacy of openness will intensify the need for the transition between uncertainty reduction and ambiguity navigation, as well as between affective and rational rhetoric. A low level of legitimacy will also require stronger coupling between different practices of open and formal strategy-making. The bridging will be achieved through the highly structured design of community engagements involving more controlled matching of community interest and strategic themes, mobilizing community members around a limited number of strategic themes. It will also require a higher level of compliance with existing institutionalized practices of strategy-making and thus a higher degree of issue-selling staging. Therefore, in the context of an open strategy initiative with low legitimacy, the transition between open and restricted participation and fluid interactions and structured events will become more salient. In other words, the context of low legitimacy of openness in an organization requires a higher level of closedness in the online community organizing for the creation of strategic influence.

The findings of this study also allow for the theorizing of the relationships between bridging mechanisms in the context of high legitimacy. A greater level of open practice legitimacy implies a higher level of its acceptance on an organizational and institutional level (Ansari et al., 2010; Jarzabkowski, 2008). It also implies the perception of such practices by senior management and community members as appropriate and desirable (Suchman, 1995). Therefore, in the context of high legitimacy, the resonance between strategic concepts used for meaning creation in the online community and formal strategy-making process become less salient. Online community discussions are thus able to utilize strategic concepts distant from the general strategic discourse of formal strategizing. Additionally, the boundaries of strategic discussions can be flexible to enable the generation of distinct and novel

multiple meanings around strategic concepts, which can also be coupled more intricately. However, the synthesizing of the coherent strategic narrative will play a crucial role in the transformation of created holistic meaning from the online community to the formal process of strategy-making. For this reason, the transition from affective to rational rhetoric, and between ambiguity navigation to uncertainty reduction, will remain salient. Similarly, in the context of high legitimacy of openness, the higher level of demarcation (Smets et al, 2015) between practices of open organizing and formal strategy-making becomes focal. The autonomous activities of the online strategy community have to be protected from strong alignment with practices adhering to institutionalized practices of strategy-making. Therefore, a lower level of issue-selling staging and matching with strategic themes will be required. The loose matching between community members' interests and senior management foci will lead to increased dispersion of discussion content, meaning that there will be less need for conversion between restricted and open participation. At the same time, a higher level of autonomous activities will create contestation and competition among multiple strategic initiatives emergent through online collaboration. In such a context, stronger compliance with institutionalized practices of strategy-making on the stage of issue-selling performance will facilitate greater alignment with attentional structures of senior managers (Ocasio, 1997). That implies greater salience of transition from fluid interactions to structured events. In other words, in the context of high legitimacy of openness in an organization, a higher level of community openness will be required in the online community organizing for the creation of strategic influence.

6.2 Organizing an online strategy community for influence: design, cooperation and content decisions

The extant research on open strategizing emphasizes the underlying tensions between openness and closedness (Dobusch et al, 2017) and the importance of its balance for efficient strategy-making (Luedicke et al., 2017). The findings of this study reveal three decision areas that profoundly affect the level of inclusion and exclusion of participation and content in online community discussion, namely: design, cooperation and content decisions. The successful organizing of an online strategy community to create impact on strategic decision-making through more transparent and inclusive strategizing practices will require considerations of contradictory

demands (Hautz et al., 2017; Heracleous et al., 2018; Smith and Lewis, 2011) and interdependency among these three decision areas (Adler, 1995; Siggelkow and Rivkin, 2005). Specifically, I identify the shaping of strategic content as a distinct governance mechanism for an online strategy community that will be consequential for design and cooperation decisions. Figure 12 depicts a framework for organizing a strategic community[24].

Additionally, I argue that successful organizing of an online strategy community will require the responsible managers to adopt a central role in structuring community, fostering its growth and development and shaping content of community discussions. Moreover, actors managing an online strategy community will require not only a general knowledge of conventional strategic planning and analysis in the context of a particular organization, but will have to develop additional networking, communication and online community design competences.

Design choices and community boundaries. Similar to other types of online communities such as communities of engineers (e.g. Haas et al., 2015; Foss et al., 2016), open innovation communities (e.g. Mollick, 2016), shared platform communities (Reischauer and Mair, 2018), or interest groups (e.g. Massa, 2016), the structure and procedures for members engagement will remain important elements of community governance. However, an online community that aims to create an impact on organizational strategy will be inevitably exposed to the contradictory demands (Lewis, 2000) of increasing diversity and inclusivity of participation and inherent sensitivity of strategy-related discussion (Hautz et al., 2017). Therefore, the aspiration of influence on the formal strategy-making differentiates the online strategy community from other communities mainly organized for knowledge creation (Faraj et al, 2011) and knowledge sharing (Neeley and Leonardi, 2018). The increased inclusivity, specifically of external participants, can be motivated by two reasons. First, the knowledge relevant for strategic decision-making often disseminated far beyond the formal boundaries of an organization (Spender, 1996). Second, the epistemic culture of strategy-making often implies the engagement with external actors such as consultants, customers or industry experts (Kaplan, 2011; Knight et al., 2018).

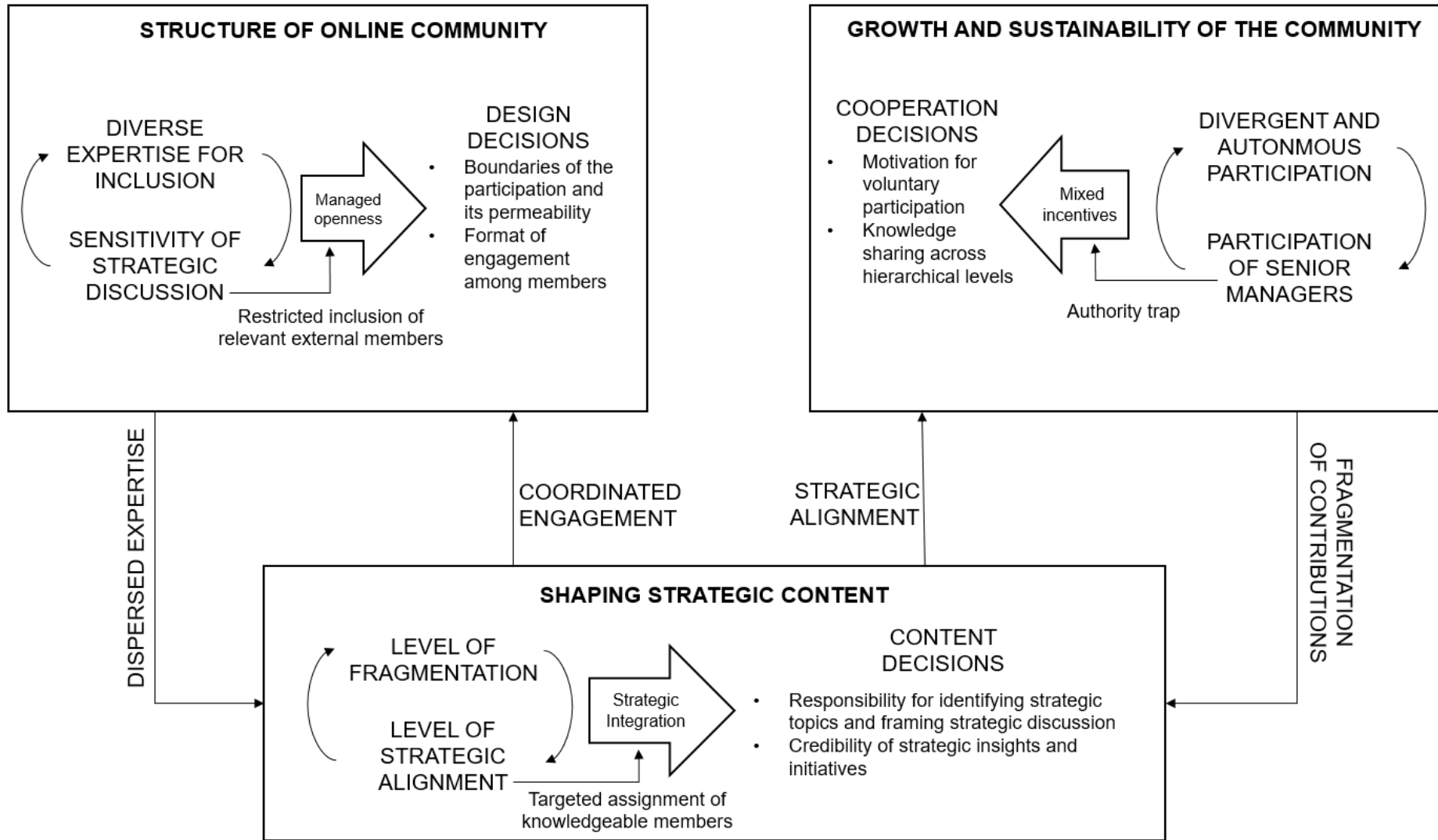[24] Figure 12 is presented on the next page.

Figure 12. Framework for organizing strategic online community

However, controlled and targeted interactions or collaborations with external actors in the context of formal strategizing becomes problematic in a transparent environment of the online community. Therefore, the contradictory demand of participation diversity and information sensitivity (Smith and Lewis, 2011) will be less prominent in the context of the internally open online community, but this contradiction will be salient in the context of community open to the participation of external actors. Therefore, the inclusion of external actors in online strategy discussion will require managed openness that implies more elaborate procedures determining the level of their access and engagement. Additionally, this will require community managers to become mediators between internal community members and selected external members invited to contribute to the discussion. Hence, managed openness enables internal members to benefit from the insights provided by external contributors, while also restricts engagement of external members with potentially sensitive strategic information discussed online. Therefore, the balancing between contradictory demands of participation diversity and strategic sensitivity will require high permeability of online community boundaries for internal members and low permeability of community boundaries for external actors. The identified contradiction enhances the argument about the need for a higher level of closedness for the sake of openness (Dobusch et al, 2017) by demonstrating how the lower level of external participation can be utilized for the higher level of openness in the internal discussion.

Cooperation decisions and the authority trap. The continuous and voluntary participation of members is crucial for the sustainability of an online community (Preece, 2000; Sproull et al., 2007). Furthermore, the degree of engagement and knowledge exchange among participants with diverse functional and hierarchical backgrounds influences the generative capacity of online communities (Faraj et al., 2011; Ray et al., 2014). However, the findings of these studies revealed a contradiction between motivating participation by encouraging divergent and autonomous input less aligned with dominant strategic logics (Bettis and Prahalad, 1995) and participation of senior management that should potentially assure the impact of strategic discussions. The creation of open strategizing initiatives often are driven by the aspiration to create much more direct and free-flowing knowledge exchange (Sproull et al., 2007; Faraj et al., 2011) and therefore autonomous participation will facilitate more innovative and unconventional strategic insights. At the same time, the participation of senior

management implies a higher level of online discussion impact. The extant open strategy literature often suggests that the direct involvement of senior managers in the selection of strategic issues for online discussion, or selection of suggested solutions, predominantly unfolds in a closed manner and often backstage (Dobusch et al., 2017; Luedicke et al., 2017). However, the participation of senior managers can equally reduce motivation to participate as the presence of senior managers can create a sense of control and monitoring (Neeley and Leonardi, 2018), or decrease the level of autonomy through domination of the online discussion, thus decreasing the motivation to contribute with unconventional strategic perspectives due to fear of retribution (Detert and Treviño, 2008). The evidence of this study suggests that direct and proactive engagement of senior managers with the content of online discussion (beyond the selection of strategic issues and corresponding solutions) may be impeded by the authority trap. The authority trap suggests that senior managers' perception of their contributions to the open and free-flowing discussion is directive rather than suggestive. The authority trap, therefore, creates a sense of senior managers' accountability for their contributions to online discussion. Fundamentally, in the organizations where the authority trap is highly prominent, the increasing mobilization of community members through their encouragement to share uncensored and divergent opinions will lead to increasing disengagement of senior management in an online community discussion, to legitimate the importance of egalitarian participation and value of diverse opinions. In addition, the low level of senior management engagement will increase the importance of various incentives (monetary and reputational) for community members mobilization.

Content shaping and strategic framing. The diverse participation and autonomous engagement in online communities will create a high level of diversification through the generation of radical opinions, novel initiatives, and critical analysis that are less aligned with formal strategic directions and dominant logics. This will require the balancing between content fragmentation and strategic alignment. Therefore, the content-related decisions will require thoughtful identification of strategic topics and skilful framing that trigger the attention of both community members and senior management (Ocasio, 1997). This decision area profoundly distinguishes the organizing of online strategy community for strategic impact from organizing other types of communities. Content decisions are influenced by design decisions that

define the diversity of available expertise and format of engagement, as well as cooperation decisions that define the level of fragmentation of discussed topics encouraged by autonomous contributions, which makes input less aligned with the strategic frames of senior management. The higher level of fragmentation of online discussion content enabled by diverse participation, together with the higher level of autonomous engagement leading to the lower level of strategic alignment, will increase the salience of strategic topics identification and framing (Cornelissen and Werner, 2014). The content shaping decision area makes the knowledge of the epistemic culture of strategy-making (Kaplan, 2011) and discursive skilfulness (Mantere, 2005; Vaara, 2004; Laine and Vaara, 2007) of community leaders the focal competencies for managing an online strategy community. However, these competencies are not used for excluding participation (Mantere and Vaara, 2008) or wining a strategy contest (Kaplan, 2008), but for coordinating the engagement of diverse members of online community (Ray et al., 2014) and gaining the attention of senior managers (Ocasio, 1997). Therefore, the content decisions lie at the crossroad of interdependencies with design and cooperation decisions. The identification of relevant strategic topics influenced the design decisions through a more structured engagement of targeted experts (internal and external). While framing activities enabled a higher level of strategic alignment and therefore the attention of senior managers (Ocasio, 2011), while also narrowed the attention of wider online community membership toward strategically relevant themes.

This study, therefore, suggested that organization of open strategizing through an online community is a complex problem of organizing collective actions (March and Simon, 1993; Puranam et al., 2014), which entails coordination of members with diverse expertise, their mobilization in the absence of clear hierarchical authority, and skilful framing for effective communications that enable influence on formal strategy-making. However, these activities are further compounded by the transparency of the online setting, diversity of potential contributions, and requirements to assure the attention of both senior managers and the wider community. The identified relationships between decision areas imply their strong interrelatedness, and therefore a change in one area will affect other decision domains. The high level of interdependency between decision domains calls for more centralized coordination (Siggelkow and Rivkin, 2005) to balance the contradictory demands (Knight and Paroutis, 2017). The organizing of open strategizing, therefore, will require a dedicated

managerial role, which was fulfilled by strategy professionals in this study. However, such managerial roles will require additional competencies from community leaders that go beyond the conventional expertise of strategic analysis and forecasting (Whittington et al., 2017) or internal consultant working with specialized strategic projects within the organization (Bernholz and Teng, 2015).

6.3 Implications for theory

This section will provide a discussion around the contributions of this study to the various streams of strategic management literature. The contributions are divided into several sub-sections guided by the broad areas of extant literature informing this study: open strategy, SaP, strategy process and online community literature.

The influence dilemma of open strategy. Although organizations increasingly adopt various online platforms (Baptista et al., 2017) and social software (Haefliger et al., 2011) to boost the productivity of strategy-making, the impact of such open strategizing initiatives remains unclear (Hautz et al., 2017). Understanding online community organizing in the large organization, therefore, extends the discussion around underlying tensions and contradictions of open strategizing (Hautz et al., 2017; Malhotra et al., 2017; Luedicke et al., 2017). Although the process dilemma (Hautz et al., 2017) somehow addresses the challenge of inclusion of multiple actors with varied functional and hierarchical backgrounds (Ketokivi and Castañer, 2004; Reitzig and Sorenson, 2013) specifically in terms of power asymmetries (Miller et al., 2008; Pappas and Wooldridge, 2007) and need for additional resources (Andersen, 2004) it is less explicit about the tension between senior management inclusion and strategic alignment of open strategy initiative. Although the open strategy literature broadly assumes the involvement of senior management in the process of inclusive and transparent collaboration (Tavakoli et al., 2017; Baptista et al., 2017; Laura Dobusch et al., 2017; Hutter et al., 2017), this study demonstrates that direct involvement of senior management can in fact be counterproductive for the generation of unconventional suggestions and open strategic discussion, as it may impose dominant strategic logics (Bettis and Prahalad, 1995) and decrease the motivation of online community members to voice radical and novel ideas. At the same time, low level of engagement of senior managers in shaping content of open strategizing initiative will

reduce the strategic impact of insights generated through online collaboration, and therefore will lower the impact of such an initiative on formal strategy-making. Hence, the benefit of democratizing strategy by inviting diverse contributors (Stieger et al., 2012) comes with the challenge of strategic influence. This study therefore reveals eminent contradiction between openness and influence that has not previously been identified. The more open the discussion on online platform (through means of wider participation and unstructured content), the lower the impact of such community on the formal strategy-making of organization.

This study also contributes to the open strategy literature by explaining the mechanisms enabling the influence (Hautz et al., 2017) of the flexible and inclusive approach of open collaboration on historically hierarchical and controlled approach to strategy development (Birkinshaw, 2017; Heracleous et al., 2018). Although existing studies explain how the use of open strategizing can enhance the strategy-making through the increased reflexiveness (Baptista et al., 2017), better decision-making (Stieger et al., 2012) and strategic sensitivity (Doz and Kosonen, 2008), the concept of *bridging* developed in this study provides a more nuanced understanding of underlying practices that afford strategic influence. Specifically, this study emphasizes the importance of communicative practices (Ocasio et al., 2018) utilizing strategic concepts (Jalonen et al., 2018) and established epistemic culture of strategy-making (Kaplan, 2011). Hence, the recognition of bridging practices provides a nuanced understanding of how the tension between openness and influence can be mitigated (Hautz et al., 2017).

Finally, the identified association between content, design and cooperation decisions provides further understanding into the relationships between procedural and content openness (Dobusch et al., 2017). The extant research demonstrates the consequential influence of procedural openness on content openness. However, the conceptualization of interrelatedness between decision areas implies a reciprocal connection between content and procedural openness. Therefore, the demand for generation of strategically relevant content may restrict the level of procedural openness, and will require the use of bridging practices for achieving strategic impact. In this guise, this finding responds to the call for exploration of the effect of strategy content on the practices of open strategizing (Hautz et al., 2017).

Contributions to the combinatory view of strategy process and practice literature. Although bottom-up strategic initiatives could be delivered through the formal strategy-making process, formal strategy-making is often associated with the induced process, while strategizing through the online community also enables autonomous identification of strategic issues. This study identifies the concept of bridging and its underlying mechanisms that provides further nuance to our understanding of the process of alignment between autonomous and induced processes of strategy-making (Burgelman, 1983). Specifically, the bridging process demonstrates how micro-practices enacted by organizational actors can be linked with the established organizational strategy-making process (Kouamé and Langley, 2018). Furthermore, this study conceptualizes the differences between communicative practices of formal strategy-making and online community collaboration, explaining how the concept of bridging helps to couple distinct and sometimes contradictory characteristics of participation rules, norms of interaction and language use (Ocasio et al. 2018). According to Ocasio (1997) the various communication channels have different foci of attention and hence for new strategic issues or opportunities to become a part of firm's attentional perspective, a degree of commonality in attention and sense-making across channels are required (Ocasio, 2011). In this manner, bridging explains the enactment of various communicative practices that enable the creation of commonalities among attentional engagement in different organizational processes, and therefore the coupling between distinct communication channels (Ocasio and Joseph, 2005). The existing research on bridging is mainly concerned with the diffusion of the competing institutional logics (Purdy and Gray, 2009) or switching between different logics through the identification of their complementarities (Smets et al, 2015). This study introduces the concept of bridging into the context of co-existence of the two different logics of organizing strategy-making processes, rather than institutional logics. Bridging is performed by individuals located on the crossroad of two processes, through the mindful consideration of communicative practices of one organizational process while enacting communicative practices of the different organizational process. Consequently, the two imperfectly integrated strategy-making processes continue an independent co-existence, while still able to create a mutual impact.

In addition, the concept of bridging provides further insights into mechanisms that enable coordination between attentional structures in the organization (Canales,

2013). Specifically, this study emphasizes that for the creation of strategic influence, the attentional engagement (Ocasio, 2011) of actors outside of the top and middle-level management, such as online community members, becomes highly important. Thus, the strategic influence of an open strategy initiative can be only achieved through the effective coordination of multiple actors. However, the diverse motivations (Malinen, 2015) and passion (Faraj et al., 2011) of community members hinder the commonality of attentional engagement among them (Ocasio, 2011). Hence, the various bridging practices underpinning bidirectional framing and bidirectional structuring enable the creation of congruence among attentional structures of independent communication channels (Ocasio, 1997). The responsibility for organizing this process can be assigned to organizational actors outside of TMT (Canales, 2013; Canales, 2015). Additionally, this process has a two-directional nature that implies the importance of attentional foci of two distinct types of the audience, not limited to senior managers. In this way, this study provides further insights about the mechanisms that makes it possible to shape the attention of organizational actors (in this case of community members) around the strategic issues relevant for larger organization (Canales, 2015).

Subsequently, this study contributes to the attention-based view (Ocasio, 1997) by extending the primarily structural view on communication channels with a more recent communication perspective (Ocasio et al., 2018). By investigating the use of communicative practices in the context of open strategy implementation within a large organization, this study responds to the call for further understanding of links between micro-practices and organizational level processes and more broadly to the call for the research explaining combinatory view on strategy process and practices research (Burgelman et al., 2018).

My findings also connect to the issue-selling literature (Dutton and Ashford, 1993; Dutton et al., 2001), which is an established method for influencing organizational strategy. Despite the fact that organizations increasingly adopt various social software to boost the productivity of strategy-making (Haefliger et al., 2011) we know little about its effect on the process of issue-selling. Hence, this study demonstrates that with the utilization of an online community, issue-selling attempts become two-sided: the middle-managers, or in this case strategy professionals, should not only target their selling moves toward top management (Dutton et al., 2001) but also towards online community members. The process of framing the topics of community discussion is

equally important to framing strategic artefacts for higher management. In line with existing theory, my findings demonstrate the importance of seller credibility (Dutton and Ashford, 1993). However, engaging a community provides a greater pool of experts that selectively and interchangeably can be engaged in selling attempts of different strategic issues.

Implications for the role and competencies of strategy professionals. The SaP literature emphasizes the discursive nature of strategy-making (e.g., Samra-Fredericks, 2003; Vaara et al., 2004; Mantere, 2005; Mantere and Vaara, 2008, Parotius and Heracleous, 2013; Hardy and Thomas, 2014). In line with previous research, this study supports the importance of discursive skilfulness of strategists; specifically, this study demonstrates the importance of strategic concepts (Jalonen et al., 2018) as boundary spanning objects (Spee and Jarzabkowski, 2009) that not only facilitate collaborative meaning creation among organizational actors with diverse functional and hierarchical backgrounds, but allows demarcation of the strategic conversation boundaries. Hence, the strategists involved in organizing open strategizing have to be skilful in the identification and discursive embedding (Jalonen et al., 2018) of the existing strategic concepts into the context of open and fluid online conversation, as well as its synthesizing into coherent strategic narratives (Dalpiaz and Di Stefano, 2018). This also extends the argument about the importance of skilful integration of emotional and rational devices (Samra-Fredericks, 2004). Moreover, this study provides evidence that such skill is not only relevant for senior managers in the communications at the TMT level, but equally relevant for the strategist in boundary-spanning positions, that bridge strategizing processes adhering to different organizing logics (Sambamurthy and Zmud, 2000).

The importance of bidirectional framing and structuring of communications in bridging efforts also highlights the salience of skilful use of strategic discourse and strategic concepts (Jalonen et al., 2018), cultural apparatus of strategy-making (Kaplan, 2011), and knowledge of strategy communication genres (Yates and Orlikowski, 1992). The centrality of strategic skilfulness also implies the importance of strategy professionals in coordinating bridging of open strategizing and formal strategy-making, which provides additional insights into the effects of open strategizing on the roles of strategy professionals (Hautz et al., 2017). Although Whittington et al. (2011) argue greater inclusivity and transparency in strategizing fundamentally alters

the nature of the strategy work performed by strategy professionals, these very strategy professionals are often overlooked in the investigation of changing nature of strategy processes and practices. As such, the adoption of open strategizing practices can reinforce the importance of strategy professionals in organizations and extend their traditional role from strategic planners and analysts (Whittington et al., 2017) towards strategic coordinators (Siggelkow and Rivkin, 2005) and knowledge managers (Nonaka, 1988). Equally, the organizing of online strategy communities includes elements of the role performed by entrepreneurial middle-level managers (Floyd and Lane, 2000; Floyd and Wooldridge, 1997, 1994) who attempt to influence the strategic direction of a company through skilful issue-selling (Dutton et al., 2001) and championing of bottom-up strategic issues (Burgelman, 1996).

Governance, leadership and affordances of online strategy communities. Although this study considers the online community as a specific form of open strategizing initiative, the findings of this study also provide insights relevant to the online community literature.

In line with extant research, my findings emphasize the importance of governance mechanisms for managing community boundaries and participant mobilization (Jarvenpaa and Lang, 2011; Reischauer and Mair, 2018). However, this study emphasizes a particular salience of strategic content shaping, that was predominantly seen as a mechanism for conflict reduction and engagement stimulation (Kane et al., 2014). If an online strategy community is seen as an additional communication channel that affords identification of strategic issues or initiatives (Ocasio, 1997), to achieve impact on formal strategy-making it must have a degree of commonality with other strategy related communication channels across the organization (Ocasio, 2011). Therefore, content shaping enables a degree of strategic alignment while also requiring more centralized leadership and a high level of offline activities (Reischauer and Mair, 2018). Hence, for online communities aspiring to create strategic impact, the content shaping activities will become much more central and will require dedicated leadership roles. Yet, the high level of centralization and backstage activities is somehow counterintuitive for online communities prone to self-organizing (Sproull and Arriaga, 2007), flat hierarchies (Dahlander and O'Mahony 2011) and shared leadership (Johnson et al., 2015). This invites further debate about the essential characteristics of online communities and draws attention to further

understand characteristics and governance mechanisms distinctive for online strategy communities compare to online communities for open innovation (e.g. Mollick, 2016) or for other purposes. In addition, this study recognizes three decision areas that explain affordances for collaboration and strategy-related content production. Accordingly, content shaping in online communities enables strategic alignment but at the same time constrains the inclusion of community members and the flexibility of their interactions (internal and external actors). Yet, it also affords strategy professionals with rapid access to diverse strategic insights that enhance understanding of organizational strategic issues. Future research could therefore take a closer look at affordances that different types of social media such as microblogging, wikis, social networking and social tagging platforms (Leonardi et al., 2013; Leonardi and Vaast, 2017; Vaast et al., 2017) provide, specifically for professional strategists.

6.4 Managerial implications

This study provides a number of managerial implications relevant for an organization interested in the utilization of an online platform for opening the strategizing processes. First, the research has demonstrated that an online strategy community, if adequately organized, can be seen as an effective form of open strategizing - facilitating strategic debate within organizations and allowing recognition of strategic issues or strategic insights relevant for strategic issue management. The online community discussion enhances organizational technology and market intelligence through continuous gathering and triangulation of information that leads to the identification of strategic initiatives and opportunities. However, the initiation, growth and sustainability of a productive online strategy community, capable of influencing on organizational strategy, posit a paramount challenge for organizations.

Next, the high interdependencies between identified decision areas and the realization of the bridging process demand centralized decision-making. Therefore, successful organizing of an online strategy community requires a team of dedicated managers that have the task to coordinate decisions about community design, mobilization of its members, shaping and synthesizing of strategically relevant insights. In addition, the community organizing requires dedicated resources and therefore role of community leaders demands organizational support and recognition from higher management. As this study demonstrated, strategy professionals can be

suitable candidates for the role of community leaders. However, organizations lacking roles of dedicated strategy professionals may wish to appoint competent middle-level managers that are capable of bridging the divide between the open nature of an online community and the typically hierarchical nature of formal strategic decision-making.

The task of organizing an online strategy community will require strategy professionals or other managers to possess particular strategy-related knowledge. The centrality of strategic concepts for bridging mechanism and the importance of content shaping will require community leader to have deep knowledge of the general strategy discourse within an organization. Hence, the involvement of community leaders into work with strategic issues through participation in cross-unit strategic forums and access to the direct dialogue with senior decision-makers will enable community leaders to achieve better transferability of insights between formal and open strategizing. In addition, the importance of compliance with institutionalized strategy-making practices in enacting bidirectional structuring of communication will require the deep knowledge and understanding of the organization-specific context of strategy-making. Hence, the knowledge of appropriate ways and timing to approach relevant decision-makers, appropriate packaging of the issues, formal and informal organizational networks and events focal for the strategy-making process, will provide community leaders with a better position to perform bridging activities.

Finally, the dedicated role of the leader of the online strategy community requires a set of skills going beyond strategy-making such as networking and communication skills and some knowledge of online community design and dynamics. The combination of networking, communication, and technology skills can be attained on an individual or a team level. Strong networking skills are pivotal for identifying relevant experts and engaging them in appropriate community discussions. The continuous cultivation of new connections within and outside an organization enables the creation of expertise pools that credibly inform strategic conversation. Next, a strong command of language and writing skills are relevant for prompting online discussion. Given that a high level of members' engagement is crucial for any online community, the community leaders have to be skilful in making strategically relevant questions, captivating to the broader public with diverse functional backgrounds and often with a strong operational focus. The knowledge of online community design is relevant for making both coordination and design choices. This does not necessarily imply knowledge about information systems or software development, but rather a basic

understanding of the main types of online platforms and their governance mechanisms. This knowledge will help online community leaders with making choices that are suitable for the demands of a particular organization.

Chapter 7. Conclusions, limitations and suggestions for future research

Drawing on a longitudinal case study of a large telecommunication organization, this study develops theoretical insights that extend the understanding of open strategy organizing. The two developed models explain various practices and mechanisms that are crucial for the organization of an online strategy community in order to have strategic impact. The first model explains how strategy practitioners can bridge co-existing processes of open collaboration through an online community and the formal strategy-making in the organization by utilizing bidirectional framing with strategic concepts, bidirectional structuring of communications and legitimacy of openness. The second model conceptualizes the design, cooperation and content shaping decisions and their interrelatedness and explains how the set of contradictory choices required for organizing a strategy-focused online community can be best managed.

Notably, both models speak to the growing body of literature on open strategizing as it seeks to address the puzzle of contradictory demands between open and closed strategizing. The extensive research recognizes various tensions that implementation of open practices evokes (Hautz et al., 2017; Dobusch et al., 2017; Heracleous et al., 2018). However, scholars mainly provide insights about balancing between open and closed practices as a means for successful use of open strategizing in the context of inherently open organizations (Dobusch et al., 2017; Luedicke et al., 2017). Whilst the mechanisms enabling efficient co-existence of open strategizing in the context of the complex system of multiple practices constituting the strategy-making process of established for-profit organization remained a less explored area (Whittington, 2019). This study, therefore, extends the existing research on open strategizing. Further, this study responds to the call for the combinatory view of strategy practice and process research and particularly to the call for further research utilizing the communicative perspective of the attention-based view (Ocasio et al., 2018). Building on the categories of communicative practices suggested by Ocasio and colleagues (2018) this study provides further details into the fundamental differences in characteristics of open and traditional strategizing and its impact on the organizational strategy. Furthermore, this study expands previous research that focused on open initiatives independently from the broader organizational context, and therefore pays attention to the relationships between open strategizing and the established formal strategy-

making process. Specifically, the impact of open strategizing on the decision-making process was so far implicitly assumed through the involvement of senior managers (Luedicke et al., 2017; Hutter et al., 2017; Malhotra et al., 2017). Hence, this study opens new avenues for research on the co-existence and influence of open strategizing and institutionalized strategy processes of an organization (Hautz et al., 2017; Burgelman et al., 2018) through various communicative practices in a more dynamic and actor-centered way. The practice lens focusing on individuals and their actions and interactions (Whittington, 2006; Vaara and Whittington, 2012), enables future research to calibrate the level of analysis (from micro to institutional) for better understanding of how benefits of the co-existence between open collaboration and the formal strategy-making process can be yielded.

Further, the findings of this study provide novel insights about the interconnectedness of contradictory demands of open strategy organizing (Hautz et al., 2017) and consequently the importance of centralized leadership for the governance of open strategy initiative. Further, it suggests that strategy professionals are suitable candidates for taking up the role of online strategy community organizers. Hence, this thesis provides evidence of the influence of greater openness on the nature of strategy work and specifically on the role of strategy professionals in strategy-making (Whittington et al., 2011). This study also provides suggestions for a required skillset that combines the strategy apparatus with other coordination and communication skills. Hence, future research could also look further at competencies required for organizing an online strategy community (or managing open strategizing in general) and how these skills differ from offline strategizing (Whittington et al., 2017). Finally, this study investigates the open strategy initiative realized in a particular form of the online community and acknowledges the general affordances provided by the fluid format of such a platform. Future research could also take a closer look at affordances of other types of social media (Leonardi et al., 2013; Leonardi and Vaast, 2017) that are relevant specifically for professional strategists.

My research also has some limitations. First, a single case study research design implies the context-specific nature of the findings. However, in the field of strategic management, context-specific research provides valuable insights (Vesa and Vaara, 2014) that can be generalized to theory (Eisenhardt and Graebner, 2007). The further investigation of open strategy initiatives in the context of large organizations with the historically hierarchical approach to strategy-making, can provide a deeper

understanding of co-existence of open organizing and more structured and formal approaches to strategy development. Hence, more comparative studies can be done to verify models developed in this study and to tease out further nuances of open strategy organizing. Next, this study recognizes issue-selling activities (Dutton et al., 2001) as the manifestation of the influence of open strategizing. Yet, it does not account for the degree of success of these activities. The scope of this study does not allow to report about organizational strategic changes triggered by the insights developed through the online strategy community. Hence, more longitudinal studies are required to understand and track how activities of the online platform, or open initiatives in general, are reflected in specific changes in an organizational strategy. One can speculate that the very existence of an online strategy community influences the larger organization through knowledge sharing and learning discussions about various strategic topics (Neeley and Leonardi, 2018). However, tracking and demonstrating the influence of open practices on the formal strategy process is a great avenue for further research. Further, the SaP perspective allows focusing on different outcomes such as broader adoption of the practice or success of a particular episode of strategizing (Johnson et al., 2003; Whittington, 2007). Therefore, future research could also look at the impact criteria of open practices and how they can be measured, specifically in the context of traditional hierarchical organizations. By comparing different open practices among various organizational settings, future research could provide intriguing insights into the characteristics and antecedents of open strategizing influences.

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Appendix 1. Interview protocol matrix

	RQ 1	RQ 2
Background information of interviewee		
Respondents position and job description	X	X
Tenure in Telco	X	X
The formal strategy-making process		
Description of the strategy process	X	
Main milestones and deliverables	X	
Main practices used in strategy work	X	
The online community implementation		
Community emergence	X	X
Challenges for community development		X
Strategies to overcome the challenges		X
The online community impact		
Main objectives of the online community	X	X
Projects emergent from the platform	X	X
Outcomes of the initiatives	X	X
Reaction from management	X	X
Participation in community discussion and projects		
Motivation to get involved	X	X
Tenure of the membership and performed activities within the community	X	
Use of community discussions in respondents' work	X	

Appendix 2. The decision from the Ethics Committee

The Secretariat
Level 11, Worsley Building
University of Leeds
Leeds, LS2 9NL Tel: 0113 343 4873
Email: ResearchEthics@leeds.ac.uk

UNIVERSITY OF LEEDS

Anna Plotnikova

Leeds University Business School

Room G.01, 16 Clarendon Place

University of Leeds

Leeds, LS2 9JT

ESSL, Environment and LUBS (AREA) Faculty Research Ethics Committee

University of Leeds

4 June 2020

Dear Anna

Title of study: **Understanding strategic process: strategy-making and openness**

Ethics reference: **LTLUBS-176**

Grant reference: **6758661**

I am pleased to inform you that the above application for light touch ethical review has been reviewed by a representative of the ESSL, Environment and LUBS (AREA) Faculty Research Ethics Committee and I can confirm a favourable ethical opinion as of the date of this letter. The following documentation was considered:

Document	Version	Date
LTLUBS-176 Light Touch Ethics Form_Anna Plotnikova.doc	1	08/06/17

The reviewer made the following comments:

- Remember to send an information sheet prior to the interviews themselves and to ensure that there is a very clear understanding with the host organization re: anonymisation and initial identification of the participants for interview.
- You may find it helpful to refer to the guidance on dealing with consent and confidentiality with focus groups:
  http://ris.leeds.ac.uk/ConfidentialityAnonymisation and

  http://ris.leeds.ac.uk/InvolvingResearchParticipants.

Please notify the committee if you intend to make any amendments to the original research as submitted at date of this approval, including changes to recruitment methodology. All changes must receive ethical approval prior to implementation. The amendment form is available at http://ris.leeds.ac.uk/EthicsAmendment.

Please note: You are expected to keep a record of all your approved documentation, as well as other documents relating to the study. You will be given a two week notice period if your project is to be audited, there is a checklist listing examples of documents to be kept which is available at http://ris.leeds.ac.uk/EthicsAudits.

We welcome feedback on your experience of the ethical review process and suggestions for improvement. Please email any comments to ResearchEthics@leeds.ac.uk.

Yours sincerely

Jennifer Blaikie

Senior Research Ethics Administrator, the Secretariat

On behalf of Dr Kahryn Hughes, Chair, AREA Faculty Research Ethics Committee

Appendix 3. Information sheet provided to participants

Research project on "Formal strategy processes and open strategy in the context of the turbulent environment"

Please take the time to read the following information and if you have any question, please address them to Anna Plotnikova anna.plotnikova@telco.com

What is the purpose of the study?

This study seeks to understand how strategic processes in large organizations has changed due to environmental turbulence. The study also seeks to understand how open strategy initiatives are implemented within the organization and effects of open strategy on broader strategic process. It will help to address contemporary challenges Telco is facing for developing strategic capabilities for transition to a networked society.

Why have you been invited to participate?

You are invited to participate in this research as a member of your organization. We feel that your work is particularly important, and that this research project would greatly benefit from your involvement and expertise. It is up to you to decide whether or not to take part.

What will happen if you take part?

If you decide to take part you are still free to withdraw at any time and without giving a reason. All you need to do is to send an email to the email address noted on this information sheet. The data of this study will be based on interviews and surveys. You will be asked to do a number of interviews with the researcher or fill in a survey. If you do not wish to answer any particular question, you are free to decline. Interviews can take from half to an hour and will be conducted in English. You will be asked to give your permission for the interview to be recorded. Please be assured that every effort will be made to not interfere with or delay work you are engaged in, or to intrude in any private matters.

Will your taking part in this study be kept confidential?

All interviews, documents and observations will be anonymised. No private names will be linked with the research material or any publications. All data will be kept confidential.

What are the possible benefits of taking part?

It is expected that this research help to address contemporary challenges Telco is facing for developing strategic capabilities for transition to a networked society. However, there are no immediate or material benefits to participating in this research. Potential benefits may arise in the sense that this project offers an opportunity to reflect upon and discuss your work. If you request, short summary reports of the research results will be provided.

What will happen to the results of the research study?

The research for this study will be used in a dissertation for a doctorate in social sciences. Some of the results of this study will be presented in academic workshops and conferences, and published in academic journals and books. You will be asked for your permission to the use of the data of this study in academic follow-up studies.

Who is organising and funding the research?

The research is funded by the European Commission (https://ec.europa.eu/research/mariecurieactions/) and is a joint project between University of Leeds University Business School (https://business.leeds.ac.uk/) and Telco AB.

Thank you for taking the time to read this information sheet!