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OPENING THE BLACK BOX: HOW STRATEGY PRACTITIONERS DEVELOP THEIR PRACTICES

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ABSTRACT

While strategic management has been the focus of much research since the 1960s, there have been comparatively few studies on strategy practitioners, the human actors responsible for the process. These actors are often reduced to a set of observable demographic variables such as education level, work tenure, or job description. Consequently there is limited knowledge regarding strategy practitioners and, in particular, little is known about how they develop their practices, the knowledge and skills they use when engaged in strategic management.

To address this gap in knowledge, this study, conducted within the strategy-as-practice (SAP) perspective, interviewed strategy practitioners identified by their peers as effective strategy practitioners. The responsive interviewing technique employed opened the so called 'black box', the subjective views of individuals, and allowed participants to reflect and, importantly, provide their meaning of what significantly influenced their strategic management practice development. Eighteen interviews were conducted and the analysis of the rich, deep data collected allowed an understanding of practice development from a practitioner's perspective to emerge.

The study revealed that this group of strategy practitioners see strategic management in holistic terms with a focus on organisational outcomes and not in a traditional, normative view which privileges the creation of a strategy. This contribution was not, however, a primary research outcome but participants view of strategic management impacted significantly on how they view themselves as strategy practitioners, the purpose of strategic management and, vitally, the practices they believe are needed to be effective. Within this context, the study shows that participants develop their practices idiosyncratically and learning from practice, notable literature and being involved with a broad range of people, were valued significantly in their practice development. It was through this meaning that participants were able to relate important aspects of their own development.

This study contributes an empirical study to the SAP perspective that goes well beyond simple demographics in understanding how strategy practitioners develop their practices. In regards to research, the selection of strategy practitioners without considering their historical development has been identified as an area that may be

problematic, especially for studies seeking to understand how strategy is practised. Business school education was not identified as a direct, meaningful contributor to participants' development. This observation raises the interesting, and unresolved, question of the actual relationship between business schools and practice. The participants' idiosyncratic career paths contributes to the viewpoints of authors who question whether the strategic management field should, or could, attain the status of a profession such as law or medicine.

ACKNOWLEDGEMENTS

The reflections of doctoral students on their journey is likely to be eclectic. There will be those students, who I have come to view as fortunate, who had a straight forward path and can honestly say that they enjoyed the experience. On the other hand there will be students who had to battle hard and, seemingly against the odds, manage to emerge victorious without permanent damage. I fall into the latter camp. It would be remiss of me not to note that there is a third group of students, larger than generally considered, who do not complete the doctoral journey. Some of my student colleagues suffered this fate, unnecessarily, and a review of the systems and processes that govern doctoral research seems long overdue.

There were people within the university I must acknowledge for without their effort, care and support I would not have completed my studies successfully. James Lockhart, through his diligence, knowledge and humour made the latter part of my studies almost fun. I learnt as much, if not more, in my final year with James than I did in the previous three, a tribute to James' ability to mentor. Andrew Dickson, a colleague who was always available to help throughout the PhD whether it be as a pilot interview subject or just to let me talk through what was happening. Andrew is one of the few people I encountered that keep the university collegial spirit alive. The late Ralph Stablein, who was always happy to sit down over a coffee and provide thoughtful and helpful advice which often provided moments of enlightenment. Finally to the admin team within the Palmerston North School of Management, in particular Pauline and Brigit, who always answered every request and query I had with a smile.

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CHAPTER 1 - INTRODUCTION

'Would you tell me, please, which way I ought to go from here?'
'That depends a good deal on where you want to get to,' said the Cat.
'I don't much care where—'said Alice.
'Then it doesn't matter which way you go,' said the Cat.
'--so long as I get SOMEWHERE,' Alice added as an explanation.
'Oh, you're sure to do that,' said the Cat, 'if you only walk long enough.'

Lewis Carroll

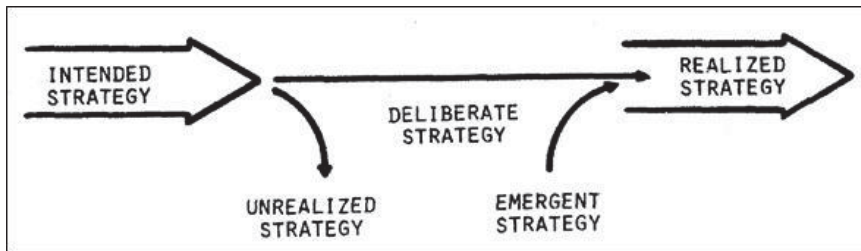
1.1 LOCATING THE STRATEGIST

This entertaining exchange between the Cheshire cat and Alice illustrates neatly, albeit somewhat simplistically, one of the major debates that has consumed the strategic management field¹ over the previous decades: should strategies be planned or do they emerge out of organisational activities. Should Alice have a destination, a concrete and unwavering place to which she is heading or should she just keep walking and, depending on what she encounters, make decisions as she goes in the hope that she eventually arrives *somewhere*.

Organisations are in a similar position. The future is, to some extent, unknowable so it is not possible to lay down a long term plan, embracing all eventualities, that can then be followed to ensure success. Comparably, having no concept of what the desired future looks like seems equally impractical. Like many situations with what appear to be polar opposites, the best place may reside somewhere in the middle ground. This position is well depicted by the familiar Mintzberg and Waters' (1985) picture of deliberate and emergent strategy (displayed in Figure 1.1), though it was somewhat more stylised in later iterations. Whilst by no means the only way strategy is viewed, Sminia (2009) observed that this representation of the strategy process is universally found in strategy texts.

¹ The term field is used to describe both the practice and research of strategic management

Figure 1.1 – Types of strategy.



Source: Mintzberg and Waters (1985, p. 21)

But where, in this model, is the strategist? What has become of Alice? The elements required to deliver realised strategy as the outcome of the strategy process – the development of plans, the emergence of opportunities and, importantly, implementation – are all tasks in the hands, or more accurately, the minds of people. Because the strategist is not located in the strategy process, the assumption appears to be that all strategists are either similar, assumed to be equal or, perhaps, do not exist at all (in which case it should be Alice, not the Cheshire Cat, who fades from the scene). All organisations, and Alice, given the same environmental conditions, will arrive at the same *somewhere* by applying strategic management practices; the process, tools and techniques, models and frameworks that abound in the field.

In Lewis Carroll’s case, the direction, path and speed of travel are entirely dependent on Alice and what she decides. Similarly, in modern business it is the people who are involved in the decision-making processes that determine the selection of the deliberate and emergent processes that, through implementation, result in strategy outcomes. These are the people in the field referred to as strategists or strategy practitioners². In measuring organisational performance, as is commonly employed to review strategic effectiveness, the field must be measuring the ability and practices of strategy practitioners if outcomes are related, at least in part, to the decision making from which they supposedly emerged.

This study, therefore, seeks to place the strategy practitioner back in the strategic management process and sets out to expose how the strategy practitioner’s practices have been developed. Unsatisfied by the Cheshire Cat’s patronising answers to Alice,

² The term strategy practitioner is used throughout this thesis as a label capturing those involved in strategy who are often referred to by their roles or titles e.g., CEOs, CSOs, managers, planners, consultants, business advisors etc

this research analogously seeks to understand how Alice may, or may not, have been equipped for decision making by her creator, Lewis Carroll.

1.2 PROBLEM STATEMENT

The normative view is that strategic management has a positive impact on organisational performance through setting the direction and scope of an organisation over the long term (Johnson, Scholes, & Whittington, 2008). It is considered as one of the most important, arguably the most important, business disciplines to contribute to organisational performance. In business schools strategy transcends functional concerns and is predominantly the capstone course (Clegg, Carter, Kornberger, & Schweitzer, 2011) while, in practice, strategy is seen as one of the highest value added activities with over US\$44.5 billion being spent annually across the globe on strategy consulting (Datamonitor, 2011). From its 1960s origins in corporate America (Segal-Horn, 2004), strategic management, as a modern academic discipline, has established itself as a pivotal aspect in management theory and practice, becoming a largely unquestioned orthodoxy (Thomas, Wilson, & Leeds, 2013).

Despite its apparent success, strategic management is an academic discipline that has been identified as being in a state of crisis (Hambrick, 2004; Jarzabkowski & Whittington, 2008a). It has been included in a long running debate, the academic-practice divide, about its relevance to practice (Simon, 1967; Mintzberg, 1994; Mintzberg, Ahlstrand, & Lampel, 1998a; Rynes, Bartunek, & Daft, 2001; Hambrick, 2004; Bennis & O'Toole, 2005; Ghoshal, 2005). Rudd, Greenley, Beatson, and Lings (2008) observed that, despite nearly 40 years of empirical study, the evidence for a positive association between strategic planning and performance is equivocal. Some authors (e.g., Pfeffer & Sutton, 2006; Rousseau & McCarthy, 2007; Khurana & Nohria, 2008; Rousseau, 2012b) call for management to be made a profession, utilising the concept of 'evidenced based management', an approach very successfully employed in fields such as medicine. Other scholars (e.g., Mintzberg, 2003; Barker, 2010; Tourish, 2013) reject this approach as being inappropriate in what is an essentially social field. Despite the fact that management and strategy are commonly understood to be applied sciences (Kieser, Nicolai, & Seidl, 2015), practice does not appear to be guided by a consistent and agreed set of practices that are theoretically sound and built on accumulated research as in professions such as medicine and engineering. This may, in part, suggest a reason for strategic management's equivocal success.

Within this environment, and despite the recognised importance of strategic management, it appears that little is known about the people, the strategy practitioners, involved. Where do their practices, their skills, knowledge and abilities, come from that allow them to practise effective strategy and thus, theoretically, contribute positively to organisational performance. This thesis is, therefore, concerned with understanding in greater depth how strategy practitioners develop their practices. Despite over half a century of research into strategic management, it appears that relatively little research has been conducted to understand how strategy practitioners develop the skills they employ (Whittington, 1996; Finkelstein et al., 2009; Dameron & Torset, 2014) leaving a potential gap in the field's knowledge of strategists, who appear to be an under-researched phenomenon despite their pivotal role (Jarzabkowski & Spee, 2009; Cunningham & Harney, 2012).

1.3 AIM AND SCOPE OF THE STUDY

'It is discovery that attracts me to this business,
not the checking out of what we think we already know.'

Mintzberg (1979, p. 584)

The aim of this study is to improve the strategic management field's understanding of what the significant influences are on the development of strategy practitioners. Achieving this will contribute to understanding more about the research focus raised by Whittington (2006, p. 626), 'given the investments involved, how strategy practitioners are best produced is an urgent research question'. The research questions that ultimately emerged from the literature and became the focus of this study are:

How do strategy practitioners develop their practices; the skills, abilities and knowledge they use during episodes of strategy praxis?

What impact do business schools and popular management have on the development of strategy practitioners?

The first concern of the study is establishing its academic foundation. It is within the managerial and strategic cognition literature, which emerged from the interest in cognitive social psychology (Walsh, 1995), that the initial foundation was identified. This stream of research demonstrates that the knowledge, skills and expertise of individual

practitioners are contained in a knowledge structure which provides a mental representation of the world (Walsh, 1995). This view that individuals build up idiosyncratic mental representations in specific information domains is now well accepted (e.g., Walsh, 1995; Gary & Wood, 2011; Narayanan, Zane, & Kemmerer, 2011). Strategy practitioners have, therefore, developed an idiosyncratic mental representation over time for the information domain of strategic management and it is this which, in part, guides their strategic management practice.

It is important to state here that it is the *development* of a strategy practitioner's practices that is of primary interest for this study, not their practices or knowledge structure *per se*. Indeed identifying the make-up of a knowledge structure has been recognised as problematic and Walsh (1995) notes that researchers' knowledge of this is basically that individuals with experience in an information domain have a cognitive framework, while those without such experience do not. This view is echoed in the strategic management field where cognitive frameworks have been referred to as black boxes (Markóczy, 1997; Hambrick, 2007) as they are difficult to access and, therefore, difficult to study. However, to address the research area of interest will require access to this black box as it is considered that only the strategy practitioners themselves are in a position to 'know' what significantly influenced their career and practice development.

The second concern, which is discussed in detail during this thesis, is in regards to identifying research subjects. The focus of the research is on the practice development of strategy practitioners but, while identifying who is responsible for strategy is arguably more straight forward through the use of job titles or other demographic variables, identifying just who is a strategy practitioner is more problematic (Jarzabkowski, Balogun, & Seidl, 2007). Given this situation it was intended that initially individuals would be identified as the result of a peer recommendation. Jarzabkowski and Whittington (2008c) note that skilled strategic management practice can be recognised by peers and attracts respect or acceptance. This approach is conceptually aligned with Jarratt and Stiles (2010) who enlisted leadership networks and industry connections to identify and target executives seen as leading strategy, and with Rouleau (2010) who employed 'expert opinion' (p. 262) in the selection of participants. It was anticipated that the method would allow for the identification and selection of individuals who are considered to be respected strategy practitioners.

The scope of the study was constrained to a New Zealand environment although not necessarily to New Zealanders. As it was expected that, in order to understand from the participant's perspective what significantly impacted his or her practice development the study would likely require an intimate relationship to be developed and, therefore, this logistically and financially limited the potential range of participants. A further aspect that needed to be considered was the business environment in New Zealand. Small and medium-sized enterprises constitute the vast majority of all commercial organisations in New Zealand with 97% of organisations employing fewer than nineteen employees (Collins, Lawrence, Pavlovich, & Ryan, 2007). This means that New Zealand has relatively few large publicly listed companies, companies more likely to employ dedicated strategy practitioners. It was considered that in the New Zealand environment strategy practitioners were likely to be found in a range of organisational situations such as private sector, public sector (i.e., State Owned Enterprises), large family businesses, listed companies, Maori/Iwi enterprises and cooperatives. Therefore, in the New Zealand context a broader search for strategy practitioners was considered likely to be needed as opposed to just within a subset of publicly listed companies.

1.4 OVERVIEW OF THE STUDY

This study is organised into the six following chapters. The purpose of Chapter 2, the literature review, is to establish a historical perspective of strategic management and understand just what strategy is, according to the strategic management field. Importantly, what is known about strategy practitioners and their development will also be established. Chapter 3 serves as the link between the discussion of the current state of knowledge and the production of data for new knowledge. The aim of the chapter is to discuss how the research question was developed; the methodological foundation on which the research was conducted; and how the method to examine the research question was selected. The focus of Chapter 4 is on the field application of the research method and it describes in detail the implementation of the research instrument and how the data was collected. Chapter 5 then presents the key findings that emerged from the data analysis in regard to how participants viewed strategic management and how this group of strategy practitioners developed their strategic management practices. Chapter 6 discusses the study's findings in comparison with what was discovered in the literature and identifies where the study contributes to current scholarly conversations and the potential implications that arise from the study. The final chapter, Chapter 7, provides a summary of the contribution to knowledge and a review of the research philosophy and

data collection technique. Limitations are then discussed, recommendations for further research are made and some thoughts are offered to the practitioner community.

CHAPTER 2 - THE LITERATURE

'Curiouser and curiouser!'

Lewis Carroll

The literature is reviewed in two logically related areas. The first area that is examined is a question that has been debated at length: it asks what is strategy. An understanding of the meaning of this term is important in order to comprehend those factors that contribute to the development of strategy practitioners. This question emerges as being more problematic than it initially appears. Secondly, the literature relating to strategy practitioners is reviewed to ascertain what is known about this group of people, supposedly central to the strategic management process, and how they develop their strategy practices. Within this second aspect, the impact that business schools have on the development of strategy practitioners is also reviewed. Business schools, the main providers of management education, ought to be expected to have a significant impact on this development.

2.1 WHAT IS STRATEGY

'I shall not today attempt further to define the kinds of material I understand to be embraced within hard-core pornography, but I know it when I see it.'

Justice Potter Stewart – *Jacobellis v. Ohio*, 378 U.S. 184, 1964

The aim of this section of the literature review is to examine the strategic management literature to understand what is meant by the term strategy. Strategy is observed to be part of the broader field of strategic management. The review does not set out to cover the entire domain of strategy, which would, as Mintzberg et al. (1998a) observed, take several thousand pages to write and which would not be read by many people. Instead, it examines what is meant when it is said that strategy is being researched or practised. This research is focused on understanding what contributes to the development of strategy practitioners and, therefore, is a critical foundation for that research focus – what is strategy?

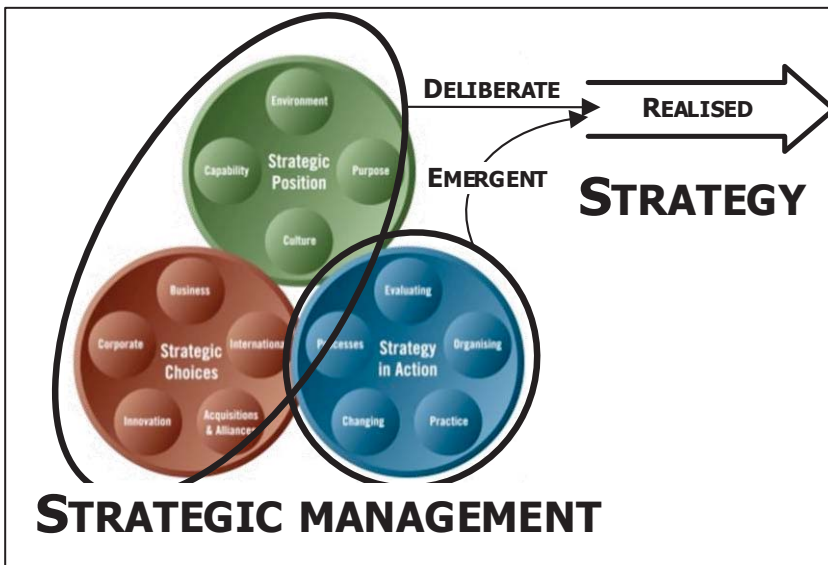
A clarification of common terms is required as many similar terms are used in differing contexts. These include: strategic planning, strategic management, strategy process,

strategy formulation, strategy-as-practice, strategic thinking, strategic decision making, strategic implementation, strategic cognition and just plain strategy to name a few (Mintzberg et al., 1998a; Whittington, 2001; de Wit & Meyer, 2010). For this research the term strategic management is an umbrella term encompassing all activities within the strategic management process. While there is not a clear and agreed definition of strategic management within the academic field, the definition by Teece (1990 cited in Nag, Hambrick, & Chen, 2007, p. 955) is introduced to help facilitate the review process.

Strategic management can be defined as the formulation, implementation, and evaluation of managerial actions that enhance the value of a business enterprise.

Teece's definition is within what is commonly termed mainstream strategic management research, research that is focused on the content of strategies or the process with which they are created and implemented (Rajagopalan, Rasheed, & Datta, 1993). Within this view the term 'strategy' can be seen as an outcome: the organisation *has* a strategy. Porter (1996) states that competitive strategy is about deliberately choosing, namely planning and selecting, a set of activities to deliver a unique mix of value. The uncompromising debate that took place within the *Strategic Management Journal* in the 1990s between Mintzberg (1990, 1991) and Ansoff (1991) was foundational in expanding the view of strategy to embrace both deliberate and emergent processes, helping towards the broader recognition that they are not mutually exclusive (Johnson et al., 2015) as had been portrayed at the time. Even given this expanded view, within mainstream strategic management thinking 'strategy' is typically seen as the property of an organisation (Whittington, 2006). However, the more recently emerged Strategy-as-Practice (SAP) perspective views 'strategy' as an activity, something people *do* when engaged in strategising (Whittington, 2006). These perspectives will be examined in greater detail later in this chapter, and are depicted in Figure 2.1 by combining a modern view of strategic management activities (Johnson et al., 2015) with a more classical view of strategy (Mintzberg & Waters, 1985).

Figure 2.1 – Strategic management and strategy.



Source: Mintzberg and Waters (1985); Johnson et al. (2015).

The history of strategic management has been documented in a number of books and journal articles, in which a chronologically focused account of its emergence is presented (Mintzberg et al., 1998a; Segal-Horn, 2004; McKenna, 2012; Freedman, 2013). However, a note of caution needs to be sounded. As Thomas et al. (2013) warned, many writers present a teleological argument when documenting the evolution of strategic management thinking. They note that strategic management history is typically presented as the result of a logical, inevitable evolution, citing the importance of Sun Tzu, Clausewitz or Machiavelli (Carter, 2013), which they argue is erroneous. Jacques (2006) notes that in the portrayal of the history of strategy, selective sources are used, often uncritically, leaving something closer to folk tradition than scholarship. In addition, Knights and Morgan (1991) argue that it is mistaken to ascribe activities carried out prior to the establishment of current strategic management thinking as though they are the same as current practice. They argue this is a discursive element designed to rewrite history in terms of the present, what Carter, Clegg, and Kornberger (2008b) called an old marketing trick, binding the current to the past to strengthen the pedigree of the field. It is important to note that the following brief look at the emergence of strategy has been developed primarily from this alleged uncritical perspective. The purpose is, however, to provide background information and a sense of the emergence of the strategic management field. While strategic management, and its historical development, is not observably central to the thesis, strategy as a practice sits within this reasonably well defined process through which much individual development is expected to occur.

Strategy, in its generic sense, is not a recent phenomenon but its study as an academic discipline remains relatively new. The desire for individuals and organisations to place themselves in advantageous future positions has been around for millennia, whether it is about survival or achieving success through leadership in war, politics (Segal-Horn, 2004) or commerce. History provides limitless stories and lessons on what would likely be viewed as strategy or being strategic today: Sun Tsu's and Machiavelli's views on war; David and Goliath from the Bible; or the lessons on strategy from Greek society (Freedman, 2013) to name a few examples. Segal-Horn (2004) notes that activities the majority of modern managers would now consider strategic have been understood and employed over the centuries. Strategic management scholars (e.g., Mintzberg et al., 1998a; Quinn, 1998; Segal-Horn, 2004) note that significant writings on strategy include some of the oldest such as the one written by Sun Tzu (or possibly his generals) in 400BC, and the still influential work of von Clausewitz, which was written nearly two hundred years ago in the 1830s.

Strategy literature has been influenced by a range of disciplines, notably economics, sociology and military planning (Freedman, 2013). The term strategy itself comes from the Greek word, *strategos*, which strictly refers to a general in command of an army (Evered, 1983). Bracker (1980) noted that the principles of strategy were initially discussed by Homer and Euripides and extended by such major writers as Shakespeare, Montesquieu, Kant, Mill, Hegel, von Clausewitz, Hart, and Tolstoy. Quinn (1998) noted that the basic principles of strategy were in place long before the Christian era and modern institutions have really only adapted and modified these to employ and benefit their own situation.

Strategy within a business context is often viewed and discussed as being relatively generic in nature. Many authors in the strategic management field have integrated examples from different contexts into the management domain without, seemingly, feeling the need to supply a rationale for their approach. War has often been used. Mintzberg (1978) contrasted Volkswagen's strategy with the strategy used by the United States of America in the Vietnam war, while Ohmae (1982) equated business strategy with battlefield strategy, judging when to attack or withdraw. Schwenk (1988) used a political event, the Cuban Missile Crisis, whilst analysing strategic decision making and Hamel and Prahalad (1998) similarly contrasted the competition between the United States and the Soviets to land a man on the moon with Komatsu's drive against Caterpillar. Sporting metaphors such as Formula One motor racing, team cycling, an

Olympic relay race and baseball were employed by Eisenhardt and Brown (1998), and recently Rumelt (2011) used strategy examples that featured Napoleon, the Gulf war, David and Goliath, US security and the Enlightenment among many business and corporate examples. These analogies of strategy principles suggest that transportability between contexts is now part of the mainstream view of strategic management.

While it appears that strategy is discussed as though it is a relatively well defined area, finding an agreed definition within the literature is difficult. Mintzberg et al. (1998a) argued that strategy requires five definitions, detailing strategy as a plan, a pattern, a position, a perspective and a ploy. Markides (1999) commented that there is a lack of common understanding among managers and academics about the content of strategy, adding that what strategy is or how to develop a good one is simply not known. SAP researchers (e.g., Jarzabkowski, 2005; Whittington, 2006) define strategy as an activity rather than an object. Indeed the term strategy itself appears to be commonly used to add magnitude and importance, especially in terms such as human resources strategy, information systems strategic plan, strategic management accounting, marketing strategy and investment strategy. Therefore Segal-Horn's (2004) observation that the term strategy is one of the most over-used, and poorly understood, terms in business appears insightful.

Contributing to the difficulty in understanding strategic management within the academic environment is the fact that the boundaries of the strategic management field are not neat and clear cut. Rather, they overlap with several other management and social science fields such as economics, marketing, organisational theory, finance, and sociology (Bowman, Edward, & Thomas, 2001). According to Hambrick (2004) this has resulted in an abundance of theoretical frameworks that include industrial organisation, contingency, game, tournament, resource dependence, upper echelons, agency, transaction cost economics, population ecology, institutional, resource-based view, knowledge-based view, evolutionary economics and the dynamic capabilities view. The practice view can now also be included in Hambrick's list.

There have been numerous definitions of strategy and strategic management published though they do not appear to be building towards a consensus. Rather, they continue to vary considerably in their scope and focus (Nag et al., 2007). Bracker (1980) identified seventeen different definitions of strategy. Nag et al. (2007) provided 11 definitions of strategic management, observing that some of the definitions highlighted general

managers; some stressed that the organisation is the relevant unit of analysis; some focused on performance; some on internal resources; some on implementation; and, some were associated with relatively unique views (Nag et al., 2007). This suggests that, while internally the strategic management community has not reached consensus, to the rest of the academic community it has presented the field as one developing in a positive fashion along a natural trajectory (Thomas et al., 2013).

Attempts have been made to overcome the difficulties associated with the definition and scope within the strategic management community (e.g., Nerur, Rasheed, & Natarajan, 2008). Nag et al.'s (2007) lexicographical analysis of strategic management articles is important in this regard. They determined that a strong implicit consensus existed regarding strategic management even though there was not yet agreement regarding a formal definition. Employing two studies, a large-scale survey of strategic management scholars and an examination of the espoused definitions of strategic management, the authors developed the following definition to encapsulate the implicit consensus:

The field of strategic management deals with the major intended and emergent initiatives taken by general managers on behalf of owners, involving utilization of resources, to enhance the performance of firms in their external environments. (Nag et al., 2007, p. 942).

The definition itself appears broad and, in some regards, clear parallels with the classic Mintzberg and Waters' (1985) depiction of the strategy process can be seen, albeit adding depth. This broadness is highlighted by the editors of the *Academy of Management Review* (Devers, Misangyi, & Gamache, 2014) who noted that there are twelve separate interest groups in the Strategic Management Society: competitive strategy, corporate strategy, global strategy, knowledge and innovation, strategy process, entrepreneurship and strategy, strategic human capital, strategy practice, cooperative strategy, stakeholder strategy, strategic leadership and governance, and behavioural strategy. All of these groups are inherently aimed at different aspects of strategic management that fit under Nag et al.'s (2007) definition.

Nag et al. (2007) acknowledged that the study had limitations, including the fact that it was limited to published articles in prominent American journals: *Academy of Management Journal*, *Academy of Management Review*, *Administrative Science Quarterly*, and the *Strategic Management Journal*. This limitation is twofold. First, it is geographically homogenous and secondly, the use of published articles meant the

articles may have been written, or revised, in accordance with the journals' requirements in order to be accepted. This, it can be argued, makes the definition potentially self-referential despite the fact that academics in the survey were not solely based in the United States of America. Accepting those limitations, the study did provide a lens into the shared conception of the strategic management field, its boundaries and shared meaning which, according to Kuhn (2012), allows a field to exist without an overall unifying paradigm (Nag et al., 2007).

It is important to note that Nag et al.'s (2007) definition comes from an accumulation of academic views on the study of strategic management. It did not include practitioner views on the phenomenon which, until recently, have been all but absent. Paroutis and Heracleous (2013) observed this weakness stating that there is a gap in the academic community's understanding of what strategy actually means to strategy practitioners. This appears to be due, at least in part, to strategy practitioners, as individuals, being absent from the majority of mainstream strategic management research (Jarzabkowski & Spee, 2009). This point will be reviewed in greater depth in the course of this literature review. Despite Barry and Elmes's (1997) argument that strategy is a narrative fiction and, therefore, the stories of strategy practitioners are worthy of research, Paroutis and Heracleous (2013) claim their recent study is the first that attempts to identify the first-order meanings (i.e., what strategists themselves mean by the term strategy) of strategy practitioners.

While the literature revealed that there is no agreed definition of strategy or strategic management and there appears to be little progress towards a consensus view, strategy, or at least strategy-like practice has been carried out for centuries seemingly without the need for a clear definition. This situation existed before, and after, the emergence of strategic management as a modern academic discipline. Knights and Morgan (1991, p. 255) observed this paradox, 'if strategy is so important, how did business manage to survive so long without 'consciously' having a concept of strategy?' Is it possibly that strategy practitioners are equally in disagreement over what is and what is not strategy? The view of strategy from the perspective of strategy practitioners is, as Paroutis and Heracleous (2013) note, a gap in the field's knowledge. Although there was no agreement on a formal definition of strategy or strategic management, a significant aspect that emerged from the literature was the concept that there was a dominant strategic management paradigm (Clegg et al., 2011) that has exerted a strong force on both teaching and practice.

2.1.1 THE DOMINANT STRATEGIC MANAGEMENT PARADIGM

'Competitive strategy is about being different. It means deliberately choosing a different set of activities to deliver a unique mix of value.'

Porter (1996, p. 64)

This section looks at what Clegg et al. (2011) term the dominant strategic management paradigm³. Guba and Lincoln (1994) define a paradigm as a basic set of beliefs that define the worldview of the holder and guide action. A range of similar terms are employed by various authors such as mainstream strategy⁴ (Jarzabkowski & Spee, 2009), traditional strategy (Mintzberg, 1998), strategy orthodoxy (Thomas et al., 2013) and classical strategy² (Whittington, 2001). This section briefly outlines the history of the paradigm and how it has developed to become a powerful force in the strategic management field (for a more in-depth discussion see Kiechel, 2010; Clegg et al., 2011).

The concept of paradigms in science can be traced back to Kuhn (2012) and refers to subjectively generated world views (Astley, 1985) that are almost unanimously agreed within a scientific, physical, or social community. The existence of a dominant strategic management paradigm appears to be well recognised within the literature and it is often referred to explicitly, albeit by numerous names as described previously. Whittington (2001) referred to the classical strategy approach as the oldest and most influential; Knights and Morgan (1991) labelled it as the orthodox strategy discourse propounded in business schools and embraced by practitioners; and, Shrivastava (1986) concluded that orthodox strategic management is founded on an ideology that supports the *status quo*. Thomas et al. (2013) recently, and very directly, called the strategy discourse a largely unquestioned orthodoxy that had assumed a significant place in both theory and practice. The research of Nag et al. (2007), who identified that a strong implicit agreement existed within the academic community, also supports this view although, as noted previously, this research had limitations.

The definition of the dominant strategic management paradigm, as used in this thesis, has been taken from Clegg et al. (2011, p. 15):

³ Clegg et al. (2011) actually employ the term dominant *strategy* paradigm but their use of the word strategy, which is common, implies that they are referring to the strategic management field. Indeed they appear to use the words interchangeably in their discussion. For consistency in this thesis the term *dominant strategic management* paradigm is employed.

⁴ The use of the word strategy again implies strategic management.

Top-down control systems orientated towards performance as the means of achieving the overarching aim of whatever goals have been specified by top management. The stress is on practices that are held to be efficient and effective, using the rhetorical devices and the environmental modelling associated with orientations to financial and market performance, stakeholders and customer service. Efficiency and effectiveness serve as justifications for whatever human, organizational and environmental consequences ensue.

This view of strategic management relies heavily on military style thinking of command and control (Whittington, 2001), complemented by a strong influence from the field of economics (Rumelt, Schendel, & Teece, 1991). In a series of distinct steps, a strategy, grounded in the economic theory that individuals are rational and act to maximise benefits for themselves, is formulated by those in command, promulgated through the organisational chain of command and executed by operational managers (Mintzberg et al., 1998a). For this strategy to be effective it requires that the future be predicted/anticipated with a degree of accuracy achieved through rational synthesis and hard data (Mintzberg, 1994).

There are accounts, mainly from an American perspective, of the birth and emergence of classical strategic management including those by Mintzberg et al.(1998a), Segal-Horn (2004) and Middleton (2002). Kaplan (2014) notes that European business schools were heavily influenced by American Business School models post-World War Two and, therefore, their experiences, it is conjectured are likely to have been similar to their American counterparts. These accounts attribute the emergence of strategic management as a modern academic discipline to 1960s America with influential voices including Philip Selznick, Alfred D. Chandler, Igor Ansoff, Kenneth Andrews and Alfred Sloan. Through leading educational institutions such as the Massachusetts Institute of Technology and Harvard Business School, and large organisations such as General Motors and Ford, the theoretical view that developed was one of a top-down, rational planning process which suited large companies in the post-war American environment (Segal-Horn, 2004).

The convergence observed above can be seen in retrospect as the beginning of classical, rational strategy based on analysis and planning, what is being referred to as the dominant strategic management paradigm. During this time the over-riding view in the

business world seemed to be that the future was readily predictable and strategic management was the means by which an organisation's future could be effectively managed (Middleton, 2002, p. xiv) if not controlled. Mintzberg et al. (1998a), in their review of the strategic management field, argued that 1980 stood out as the year where strategic management burst into prominence through the adoption of an economic based view of strategy. In particular the successful books by Michael Porter such as *Competitive Strategy* (1980), and the focus on the external environment of the firm were a strong influence (Segal-Horn, 2004). On the back of this, strategic management swiftly accelerated through conferences, university courses and new journals, and consulting firms established the strategy industry (Mintzberg et al., 1998a).

In conjunction with the rise of classical strategy, academic research was also primarily focused on the content of strategies during this time (Rajagopalan et al., 1993). Strategy content research can be defined as research which examines the content of strategic decisions regarding the goals, scope, and/or competitive strategies of organisations (Fahey & Christensen, 1986). The central focus of content research appears to be the identification of cause-and-effect relationships in a similar vein to the physical sciences. The logic - 'If a manager finds conditions X, Y, and Z, then he is most likely to be more effective if he follows strategy A than B' (William Glueck cited in Fahey & Christensen, 1986, p. 169) – highlights this cause-and-effect relationship which is demonstrated in Figure 2.2.

Figure 2.2 – Strategy content research paradigm.



Source: Fahey and Christensen (1986, p. 170).

The emergence and growth of strategy consulting firms is a factor observed by several authors (e.g., Mintzberg et al., 1998a; Kiechel, 2010; McKenna, 2012) that contributed to development of strategic management in this formative period. McKenna (2012) notes the acknowledgment by management theorists that strategic management has been profoundly influenced by management consultants who theorised, packaged, and sold the new discipline to their clients. Consulting organisations etched their brands into the strategy vocabulary; McKinsey's three horizons model, and the BCG (Boston Consulting

Group) experience curve and matrix for example (Kiechel, 2010; McKenna, 2012). Hayes (1992), paying tribute to BCGs founder, Bruce Henderson, after his death, noted that his seemingly simple concepts, which were once scorned by academics, are established in business school curricula.

Interest in economic based theories of strategic management continued to thrive following their initial popularity. The resource-based-view (RBV) of the firm grew in the 1980/90s and became an active stream of research. The focus on the external environment, combined with the assumption that firms within an industry are identical in terms of the resources they control and the strategies they can pursue (Barney, 1991), did not sit well with all strategy researchers and the RBV sought to explain performance differences by looking inside firms. The RBV examined the firm in terms of its internal resources rather than its products and markets (Wernerfelt, 1984). The study of core competencies (Prahalad & Hamel, 1990), and the related dynamic capabilities (Teece & Pisano, 1994), added to the RBV perspective but differed subtly in their way of viewing the strategy process. The RBV emphasised that these capabilities were in the evolution of the organisation whilst core competencies and dynamic capabilities were considered to be developed through a process of strategic learning (Mintzberg et al., 1998a).

By focusing on the establishment of a direct relationship between a firm's resources and competitive advantage it seems that the RBV minimised the need for strategy. A premise of the RBV is that managers simply obtain resources and develop an appropriate organisation through which to create sustainable competitive advantage (Kraaijenbrink, Spender, & Groen, 2010). Indeed Barney (1991) argued that the imitable nature of strategy tools and planning processes meant that they offered little chance of providing competitive advantage. Strategy practitioners using the same tools are argued to draw similar conclusions (Clegg et al., 2011) and, therefore, strategy practitioners and their practices are mainly eliminated from the RBV perspective. Importantly, Priem and Butler (2001), in a critique of the underlying RBV assumptions noted that the strategy concept of 'value' remains exogenous to the RBV although it is required for strategic judgement.

Strategic management, through classical, rational, economic-based planning approaches, quickly achieved a position of dominance within academia (Mintzberg et al., 1998a) although this approach was far from universally embraced. The success was accompanied by numerous scholarly voices questioning this view of strategic management. Hayes and Abernathy (1980, p. 68) pointed the finger at the 'new

managerial gospel' as a major cause of decline of the American economy. In particular they noted a preference for analytical detachment and short-term cost reduction over hands-on insight and long-term development. Knights and Morgan (1991) argued that the strategy view of the world being embraced was not inevitable but a powerful managerial discourse related to power and identity. There was a call for the field to be reconceptualised (e.g., Mintzberg, 1994; Prahalad & Hamel, 1994; Barry & Elmes, 1997) and as a result, new schools of thought began to develop within academia in response to the perceived inadequacies of the increasingly dominant strategic management paradigm.

The new strategic management perspectives, those outside the economics-based perspectives, that developed separately to, or as a response to, classical strategic management are often included under the broad term 'strategy process'. Mellahi and Sminia (2009) argue that most of the strategy research carried out can be placed 'fairly easily' into either content or process research. The process view of strategy argued that strategy was not static and rarely conformed to rational decision-making models and resultant planned change (Mintzberg & Waters, 1985; Mintzberg, 1990; Sminia, 2009). Process research focused on how a strategy is formed and a conceptual view of strategy emerged that portrayed strategy development as a meandering process influenced by a wide range of individual, organisational and external phenomena (Sminia, 2009). Of particular interest, in their review of the strategy process literature, Hutzschenreuter and Kleindienst (2006) noted the strong imbalance favouring research focused on strategy formulation with implementation often simply seen as a matter of operational detail.

Hutzschenreuter and Kleindienst's (2006) observation that there is a much stronger focus on strategy formulation (not to be confused with the term formation often used to describe emergent strategy (Mintzberg, 1978; Mintzberg, Quinn, & Ghoshal, 1998b)) appears to be an important aspect of the dominant strategic management paradigm. The focus of research was primarily on how the top-down goals are formulated by senior management (Clegg et al., 2011). This view is in alignment with Porter's (2005) view that the CEO, as chief strategist, has to lead his or her senior managers and consultants as the architects of strategy providing vision, planning and directives for others within the organisation to act upon (Breene, Nunes, & Shill, 2007). This portrayal of strategic management is likely to foster a view of strategists as elite and the implementers as inferior 'dumbbells' (Mintzberg et al., 1998a, p. 177). The consequence of this view is that in the dominant strategic management paradigm formulation appears to be a task

typically performed by management and/or consultants and implementation by staff (the military equivalent of the other ranks) throughout the organisation.

The formulation-implementation split, as Mintzberg et al. (1998a) argues, also disassociates thinking from acting, strategy from organisational change and, importantly, separates strategy practitioners from staff. Although it should not be unexpected given that the discussion is focused on the *dominant* strategic management paradigm, the formulation-implementation split appears to be a routine part of strategic management education. Livingston (1971) noted how formal management education typically emphasised the development of problem-solving and decision-making (i.e., strategy formulation) skills overdeveloping analytical ability, leaving the ability to get things done (i.e., strategy implementation) underdeveloped. This situation is what Mintzberg (2003) referred to as the production, via business schools, of analysts and not strategists. Kachra and Schnietz (2008) noted similarly, four decades after Livingston, that the traditional strategy course structure typically fails to provide training in practical implementation, contributing to what Pfeffer and Sutton (1999) termed the knowing-doing gap, where managers can create smart plans that rarely get implemented (Greiner, Bhambri, & Cummings, 2003). Livingston's (1971) observation that management graduates suffer their worst trauma when they discover that logic and rational solutions are not enough is echoed in Benjamin and O'Reilly's (2011) study in which they found a disconnect between the Master of Business Administration (MBA) programme focus and the typical situations encountered in practice leading many of the graduates that they interviewed describing how they had to rethink their practice regarding leadership.

A reason the formulation-implementation gap has been seen as increasingly problematic for traditional strategic management approaches is the observation that the rational planning ideal of implementation following sequentially after planning may be more the exception than the rule (Mellahi & Sminia, 2009). The work of Leonardi (2009) in the area of technology adoption has demonstrated that the formulation-implementation gap may also be due in part to scholars developing programmes of research that employ the change from formulation to implementation to begin or end their research. In this sense, strategy too may most commonly be researched with a focus on formulation or implementation rather than a holistic, potentially circular and iterative, process. Hutzschenreuter and Kleindienst's (2006) observation regarding the strong imbalance favouring research focused on strategy formulation provides some evidence that this is happening in strategy process research as well.

From a research methodology perspective, Huff and Reger (1987) observed that strategy process researchers tended to trade generalisability for a richer understanding of a small number of chosen situations. The use of qualitative methods, which appeared to fall out of favour as strategic management sought to gain scientific recognition (Ghoshal, 2005), has been embraced in more recent times, notably by SAP researchers who have a strong qualitative focus (Vaara & Whittington, 2012). It is recognised that Huff and Reger's (1987) review was completed during a time when quantitative analysis was dominating strategic management research as the field searched for intuitional legitimacy within the university environment (Grant, 2008; Hambrick & Chen, 2008).

The strategy process tradition, in conjunction with the practice turn in social sciences was influential in the emergence of the SAP perspective, which arguably sits outside the dominant strategy position, although this view is not universally held (e.g., Chia & MacKay, 2007; Carter, Clegg, & Kornberger, 2008a). It was introduced to the strategic management field via Whittington's (1996) article (Golsorkhi, Rouleau, Seidl, & Vaara, 2010a) in which he argued for a perspective of strategic management as an activity. SAP scholars see strategy as something people do rather than as the property of an organisation. Strategy process research, which is often linked closely with the SAP perspective, tended to group people as collective bundles of competencies or capabilities and SAP researchers sought to bring people, the flesh and blood human actors back into focus (Jarzabkowski & Spee, 2009). The SAP perspective will be looked at in more depth throughout this chapter as it is a stated goal of the SAP research agenda to get closer to strategy practitioners (Whittington, 2006) and understand what they actually do in practice. The SAP perspective has, therefore, some commonality with the current research area.

A particular criticism of the dominant strategic management paradigm, which appears to have increased in tandem with the increased interest in practice theory, is its lack of inclusion of people as individuals, the human actors that do the strategy work (Whittington, 2003; Jarzabkowski & Spee, 2009). While streams of strategy process research focused on people (e.g., upper echelons, strategic cognition), it was typically at a collective or group level, CEOs or Top Management Teams. As Whittington (2007) notes, strategy practitioners are first of all people, individuals with ideas, emotions and desires over and above conforming to a rational ideal. The omission of people within mainstream strategy research will be examined later in this literature review.

To understand more about strategic management when it is viewed as an activity conducted by humans, strategy practitioners, the focus of this chapter turns to the 'practice turn' in social sciences. Its impact on the strategic management field is studied before moving specifically to the SAP perspective which sees itself as an alternative to mainstream strategy research (Golsorkhi et al., 2010a).

2.1.2 THE PRACTICE TURN IN STRATEGY

'The new direction offered by the practice perspective is a concern for the effectiveness of strategists rather than just of organizations.'

Whittington (1996, p. 734)

The purpose of this section is to briefly overview the movement that has been labelled the 'practice turn' which introduced practice theory to social sciences. A full review of this area is well beyond the scope of this thesis (see Schatzki, Knorr-Cetina, & Savigny, 2001; Reckwitz, 2002 for an overview). This section highlights key aspects of practice theory and, importantly, the role Whittington's (1996) paper played in introducing, or even inspiring, a practice-based view that took hold within a section of the strategic management academic community. This section is included in the literature review as it provides a logical link to the SAP perspective and its interest in strategy practitioners who are the focus of this research.

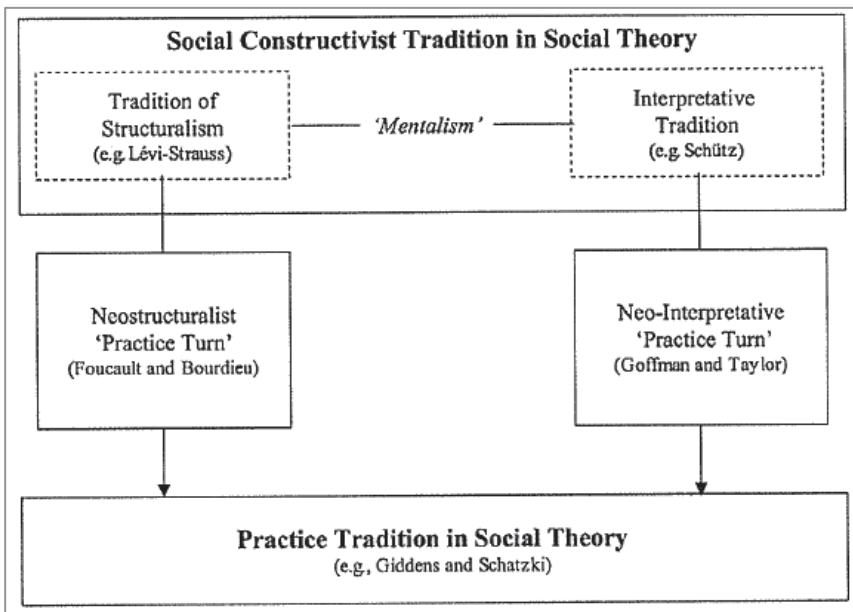
Practice theorists, according to Schatzki (2001, p. 2), generally view practices as 'embodied, materially mediated arrays of human activity centrally organized around shared practical understanding.' Reckwitz (2002, p. 250) employed a plain English definition when he described a practice as 'a routinized way in which bodies are moved, objects are handled, subjects are treated, things are described and the world is understood.' In other words a practice is what is done to get things accomplished, in this case the 'things' in question are related to strategic management. Reckwitz (2002) adds that a particular practice is different from practice in the singular that represents more general human action. Therefore, strategic management practice refers to the totality of activities that are associated with strategic management. Strategic management practices are the routinised behaviours such as a strategic planning session, which consist of 'bodily activities, mental activities, artefacts and their use, background knowledge in the form of understanding, know-how, states of emotion and motivational knowledge' (Reckwitz, 2002, p. 249).

It would be incorrect to think that the SAP perspective has been built on a solid, unified foundation of social practice theory. Within practice theory are a wide range of epistemological, theoretical and methodological differences (Golsorkhi et al., 2010a; Feldman & Orlikowski, 2011). Schatzki (2001), in his introduction to practice theory, lists Wittgenstein, Dreyfus, Taylor, Bourdieu, Giddens, Foucault and Lyotard as significant contributors to the field. Practice theory is, therefore, diverse in both scope and variety (Schatzki, 2001).

Importantly from a philosophical perspective, practice theorists appear to share the desire to overcome social theory's dualism (Whittington, 2006) between what Schatzki (2005) labels as 'individualists', those who employ a micro focus and attribute social phenomena to individual human actors, and 'societists' with a macro focus who believe it is the macro social forces and institutions that are prime factors. Practice theory recognises, respects, and incorporates both the macro- and micro- perspectives (Whittington, 2006). Indeed Chia and MacKay (2007) believe that the practice turn has flattened the macro-micro distinction by making the emerging field of practices the starting point for social analysis. The general practice approach, according to Schatzki (2001), includes all analyses that develop an account of practices or treat the field of practices as the place to base research.

Historically, practice theory emerged from a range of social theorists late in the twentieth century (Reckwitz, 2002), which makes it a relatively new perspective in terms of social theory. Rasche and Chia (2009) chart its development in two primary paths. First, there were the neo-structuralist social theorists (e.g., Foucault & Bourdieu) who shifted the analytical focus towards local practices. Second, there were the neo-interpretative social theorists (e.g., Goffman & Taylor) who transformed the interpretative tradition into a theory of practice. Rasche and Chia (2009) developed a pictorial representation of the emergence of practice theory, displayed in Figure 2.3, and the main influences that they argue contributed to its development.

Figure 2.3 – A genealogy of the practice tradition in social theory.



Source: Rasche and Chia (2009).

The practice turn, and pertinent aspects of its philosophical origins, are discussed in the methodological section of this thesis. Within the context of this literature review, it is the introduction of practice theory into the strategic management field that is important. As noted previously, the first published academic article in the strategic management field arguing for a practice theory approach was Whittington’s (1996) paper (Golsorkhi et al., 2010a) in the journal *Long Range Planning*. Figure 2.4, reproduced from Whittington’s (1996) paper, demonstrates the four perspectives of strategy he identified as he argued for a practice-based approach.

Figure 2.4 – Four perspectives of strategy.

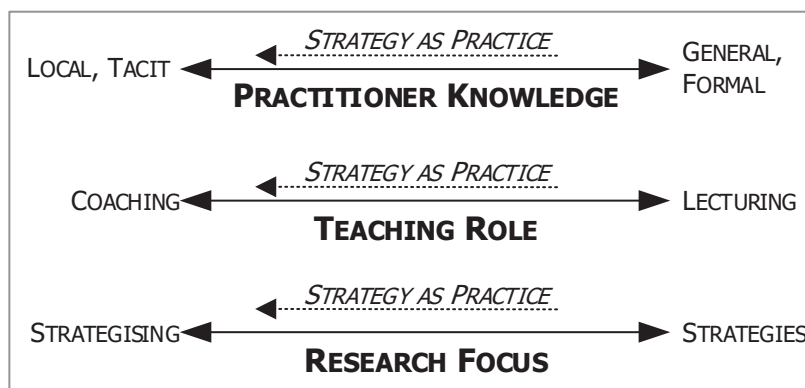
		LEVELS	
		ORGANISATIONS	MANAGERS
ISSUE	WHERE	<i>POLICY</i>	<i>PLANNING</i>
	HOW	<i>PROCESS</i>	<i>PRACTICE</i>

Source: Whittington (1996).

Whittington (1996) identified the areas of Policy, Planning and Process as separate schools of thought and described them in evolutionary terms. He associated the Policy perspective with the 1960s, the Planning perspective with coming to prominence in the 1970s and the Process perspective in the 1980s, citing what he called the well-known studies of ICI (Pettigrew, 1985) and Fosters (Johnson, 1987). The presentation of the areas in evolutionary terms may have been unintentional, with Whittington (1996) arguing that the Practice approach is not simply a continued evolution of the strategy tradition, but its presentation is, as Thomas et al. (2013) observe, typical of a particular presentation of strategic management in following a path of continuous evolution and progress. Therefore the fourth area, Practice, can potentially be inferred to be a natural and logical next step in the evolution of strategic management thought.

Whittington's (1996) article next contrasts a practice approach with what appears to be a representation of the dominant strategic management paradigm. Indeed a key point often made by SAP researchers is that SAP can be viewed as an alternative to mainstream or traditional strategy research (Chia & MacKay, 2007; Golsorkhi et al., 2010a). This view is apparent in the second figure Whittington (1996) presented, which is reproduced as Figure 2.5, where only two perspectives are depicted: a traditional view at one end, arguably the dominant strategic management paradigm, and a practice view in contrast at the opposite end.

Figure 2.5 – New directions from strategy as practice.



Source: Whittington (1996).

The research agenda outlined by Whittington (1996) provided the starting point for a perspective based on practice theory within the strategic management community (Golsorkhi et al., 2010a). He argued that what was required was to know more about the actual doing of strategy and, importantly, how strategy practitioners learn to

strategise. The challenge, as Whittington (1996, p. 734) articulated it, is to discover new ways of 'making a difference to how strategy is actually performed'.

In many regards, an understanding of both the SAP perspective, and the reasons why it emerged, first requires a comprehension of the dominant strategic management paradigm. SAP is, in part, a reaction against mainstream thought and, as Whittington (1996) argues, the SAP approach is not simply a continued evolution of the strategy tradition (despite its presentation) but it implies a new direction in strategy thinking.

2.1.3 STRATEGY-AS-PRACTICE (SAP)

The purpose of this section is to outline the SAP perspective and how it differs, or appears to differ (Carter et al., 2008a) from the dominant strategic management paradigm. The SAP field is potentially important for this research as a stated goal key of SAP is to get closer to the world of strategy practitioners (Vaara & Whittington, 2012). This section covers the key aspects of the SAP perspective. For a more extensive account, a range of books and articles have been published on the SAP perspective (e.g., Jarzabkowski, 2005; Johnson, Langley, Melin, & Whittington, 2007; Jarzabkowski & Spee, 2009).

The point of departure for this section is Whittington's (1996) seminal paper *Strategy as Practice* which first introduced a practice based view of strategy development to the academic community (Golsorkhi et al., 2010a). Whittington (1996), stated that the practice approach takes seriously the work and talk of practitioners themselves and, therefore, the concern of SAP appears to be with the activities of strategy (both deliberate and emergent) and strategy practitioners.

SAP authors have repeatedly used a statement to express the difference between the SAP perspective and mainstream strategy: conventional strategy is viewed by researchers as something an organisation *has* whereas the SAP tradition sees strategy as something people *do* (e.g., Jarzabkowski, 2005; Whittington, 2006; Johnson et al., 2007; Jarzabkowski & Spee, 2009; Rasche & Chia, 2009). Johnson et al. (2007) identify the SAP perspective with a concern for what people do in relation to strategy and how this influences their organisational and institutional contexts. SAP research is focused on what people, and not only senior managers or CEOs, actually do when they are engaged in the act of strategising. The strategic management field in this regard is part of the practice turn within the social sciences, and the management discipline itself, which looks more closely at practice and practitioner activity (Golsorkhi, Rouleau, Seidl, & Vaara, 2010b).

The absence of human actors and their activities in most academic articles on strategy (Jarzabkowski & Whittington, 2008c) is one of the main reasons cited for the increased interest in a practice theory approach. Jarzabkowski and Spee (2009) critiqued this omission and the gap the SAP research stream sought to address.

Those studies that do incorporate individuals focus primarily on top managers, as if only one elite group could act strategically. Even these findings frequently are reduced to a set of demographics such as age, tenure and functional background, which can be examined for statistical regularities in relation to some aspect of firm performance. There appears to be little room in mainstream strategy research for living beings whose emotions, motivations and actions shape strategy. (pp. 69-70)

From a philosophical perspective, SAP identifies its intellectual roots both with the practice turn in general and from specific streams of thought within the strategic management community (Golsorkhi et al., 2010a). SAP seeks, unlike many economic and psychological approaches to strategy, to distance itself from the tendency to explain behaviour as the result of actions of individuals or groups of individuals, termed methodological individualism (Vaara & Whittington, 2012). SAP sees people and their practice as intertwined with social structures and social action (Jarzabkowski, 2005). SAP is criticised, however, for its methodological positioning which some argue is not as close to practice theory as they would claim (Chia & MacKay, 2007; Tsoukas, 2010).

Within the existing strategic management field, SAP identifies closely with the strategy process tradition (Golsorkhi et al., 2010a), though it is argued that there are key differences which make it a separate research stream and not simply an extension of process research (Whittington, 2007). Chia and MacKay (2007) argue that the origins of SAP can be traced back to seminal strategy process research in the 1980s such as Pettigrew's (1985) in-depth study of strategic change at ICI (Carter et al., 2008a). Rouleau (2013) observes that a popular SAP research theme is anchored in the early observational studies of Mintzberg (1971) and his research into what managers actually do in practice. SAP has also been influenced by non-mainstream management studies that employed differing sociological lenses (Whittington, 2007). Knights and Morgan (1991) used a Foucauldian view on corporate strategy; Oakes, Townley, and Cooper (1998) based their investigation of planning on the work of Bourdieu; and Barry and Elmes (1997) used narrative analysis in their paper that viewed strategy as a form of

fiction. These seminal papers are often cited as being foundational in SAP research and articles.

The introduction of practice theory into strategic management research, via SAP, has seen a wide range of methodological approaches employed. Vaara and Whittington (2012), while comprehensively reviewing SAP research, identified the following approaches: Vygotsky and activity theory (Jarzabkowski, 2003; Jarratt & Stiles, 2010); critical discourse theory (Vaara, Kleymann, & Seristö, 2004; Balogun, Jarzabkowski, & Vaara, 2011); Foucauldian discourse analysis (Ezzamel & Willmott, 2008; Kornberger & Clegg, 2011) and Giddens' structuration theory (Jarzabkowski, 2008; Mantere, 2008) to name just a few among a range of other traditions and perspectives.

A focus of the SAP perspective has been an attempt to demonstrate its separation from the strategy process tradition. SAP research follows the practice theory tradition of treading the middle ground between the individualists and societists of social theory (Whittington, 2006). In order for SAP to be recognised as a genuine alternative to mainstream strategy research, and not just a branch of strategy process research (Golsorkhi et al., 2010a), the differences between process and practice need to be clarified. Some authors have simply categorised SAP as a part of the process field (Jarzabkowski & Wilson, 2002; Hutzschenreuter & Kleindienst, 2006) while others see SAP as similar with minor alterations due to methodological differences (Paroutis & Pettigrew, 2007). Whittington (2007) argues, however, that process research is primarily focused on organisations and change over time whereas practice research employs a 'sociological eye' (Hughes, 1971) to study strategy in all its manifestations. Utilising a marriage analogy he likens process research as primarily focused on the inputs, resources and outputs of the marriage, possibly in the attempt to develop a theory for successful marriages. The practice approach recognises that marriage is much more than just these high level abstractions and contains a myriad of phenomena such as the happy couple, families, religious members and ceremonies, types of marriage, episodes, practices, legal documents to name but a few (Whittington, 2007). For practice theorists it is within the activities, or practices, that is the primary place of study (Chia & MacKay, 2007).

It appears, however, that while clear distinctions between the strategy process and practice fields have been argued (Whittington, 2007) there may be sufficient common ground for a concerted research agenda between practice and process traditions (Floyd,

Cornelissen, Wright, & Delios, 2011; Vaara & Whittington, 2012). Whether the SAP and strategy process perspectives integrate or diverge in the future will be of significant interest for the strategic management field. At this stage it is difficult to determine the likely future and the direction that will be followed. In true strategic management tradition, the effectiveness of any changes will rely on people and implementation.

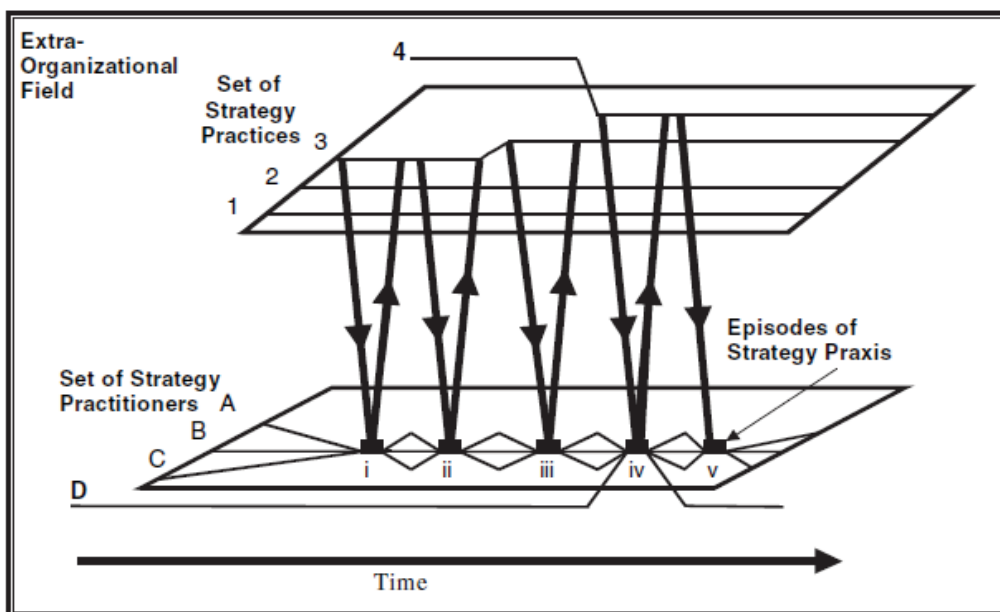
The examination of the SAP perspective has, so far, been focused on understanding the perspective and how this differs from the dominant strategic management paradigm. The key question that is now addressed examines the definition of strategy according to the SAP perspective.

SAP conceptualises strategy as a 'situated, socially accomplished activity, while strategizing comprises those actions, interactions and negotiations of multiple actors and the situated practices that they draw upon in accomplishing that activity' (Jarzabkowski et al., 2007, pp. 7-8). As noted by Jarzabkowski et al. (2007), such a broad definition is able to incorporate almost all activities and, therefore, in an attempt to refine the definition they proposed to include only those activities that were considered to be 'strategy practices' citing activities, such as, strategic planning, annual reviews and strategy workshops. This was further qualified by adding that 'strategy practices' are those activities that are 'consequential for the strategic outcomes, directions, survival and competitive advantage of the firm' (Jarzabkowski et al., 2007, p. 8). The extended definition, however, appears to remain very broad and contains the possibility that all activity could, at least, be strategic. This view is, in many regards, a key difference of how SAP views strategic management. Strategy practices include a wide range of activities, some of which may be easily recognised as part of a traditional view of strategy and others which appear more closely associated with normal business operations. Whittington (2006) notes that many business operations can be part of strategic practice, whether or not they bear the strategy label. These include board meetings, management retreats, consulting interventions, team briefings, presentations, projects, and simple talk (Hendry & Seidl, 2003). From a SAP perspective, this is how strategy happens in practice though, as Hendry and Seidl (2003) observe, this makes empirical research impracticably wide.

The development of broad research parameters, and an associated nomenclature, allowed the SAP field to focus on an overarching conception of the field (Jarzabkowski, 2005; Whittington, 2006; Johnson et al., 2007). Whittington (2006) developed an

integrated framework which can be expressed as 'Practitioners-Practices-Praxis'. In this paradigm, the term 'practitioners' refers to those who do the strategy practice; 'practices' refers to the activities which make up strategising; and 'praxis' refers to the act of engaging in strategy. This framework explored the interrelated nature of these concepts and, importantly, how they are also influenced by wider forces external to the organisation (Whittington, 2006a). Whittington's (2006) use of episodes of strategy praxis built on Hendry and Seidl's (2003) argument, based on the social systems theory of Luhmann, that strategising happens in episodes that are temporarily suspended from existing organisational processes (i.e., business as usual). The framework, which is presented in Figure 2.6, was designed to demonstrate how practitioners and practices can adapt and develop over time through praxis involving internal and external actors (Whittington, 2006). Each episode of strategy praxis can involve a range of strategy practitioners from within the organisation as well as external practitioners, such as consultants. Through employing various strategy practices in these episodes of praxis, practitioners enhance and improve their strategic ability and practices are, potentially, adapted and enhanced.

Figure 2.6 – Integrating practitioners, practices and praxis.



Source: Whittington (2006).

Strategy within the SAP perspective, therefore, appears to be all the activities that are included as episodes of strategy praxis, that is when strategy practitioners are strategising. In the terms employed in this thesis, this refers to the more holistic term of

strategic management and, therefore, the perspective would be more appropriately called strategic-management-as-practice, with the production of strategy (deliberate or emergent) being a part of the overall process. It is, however, recognised that shorter, catchier names are preferred and SAP sounds better than SMAP (the Minnesota Mining and Manufacturing Company too was far better served by the abbreviated name 3M).

This integrated framework importantly allowed for other actors to be involved in episodes of strategy praxis, namely accountants or members of the sales force, without necessarily being strategy practitioners although this is sometimes unclear within SAP discussions. Indeed the framework suggests that only strategy practitioners, including the practitioner from outside the organisation (labelled 'D' in the framework), are involved in episodes of strategy praxis. Whittington (2006), for example, identifies corporate lawyers as potential strategy practitioners whereas it would be more appropriate to call them corporate lawyers involved in an episode of strategy praxis. Certainly it appears unwise to do the reverse and call a strategy practitioner a potential corporate lawyer. While this distinction may seem inconsequential during an episode of strategy praxis, when the purpose is to identify the development of strategy practitioners, the distinction becomes significant.

While the identification of strategy practitioners as 'all those involved in, or seeking to influence, strategy-making' (Vaara & Whittington, 2012, p. 290) is theoretically wide, SAP research on practitioners has been more limited (in practice). Vaara and Whittington (2012) note that in addition to the traditional focus on top managers, SAP has extended the focus on strategy practitioners to strategic planners (e.g., Angwin, Paroutis, & Mitson, 2009; Whittington, Cailluet, & Yakis-Douglas, 2011), strategy consultants (e.g., Nordqvist & Melin, 2008) and middle managers (e.g., Mantere, 2005; Rouleau, 2005; Mantere, 2008; Rouleau & Balogun, 2011). It is the focus on middle managers that is arguably the most significant extension to the concept of who is a strategy practitioner.

The breadth of methodological perspectives that has been employed in SAP studies has also allowed different conceptions of strategy to be introduced. Seidl (2007), for example, building on work from Wittgenstein, Lyotard and Luhmann, argues that strategy has different meanings in different contexts such as education, business and science. In each context an autonomous strategy discourse is created although they give the appearance of being similar due to the use of the same labels (Seidl, 2007). This argument provides a possible avenue of insight into the academic-practice divide

although the claim that the same individuals participating in different discourses cannot transfer meaning from one discourse to another (Seidl, 2007) is one worthy of debate at some later stage. Supporting Seidl's (2007) view, Kieser, Nicolai, and Seidl (2015) noted that there have been many attempts at transferring knowledge between the different communities although they observe that the problem may be more to do with information content than the knowledge transfer processes.

It is SAP's focus on strategy practitioners that is of significant interest for the focus of this research. It is arguably the only perspective within the strategic management field that is focused on learning more about strategy from the perspective of strategy practitioners although it is recognised that micro-level strategic cognition studies may be an exception. As identified previously, there have been a number of attempts to determine what strategy means within an academic context (e.g., Nag et al., 2007) but little is known about what the term strategy means to strategy practitioners (Paroutis & Heracleous, 2013). Studies employing a SAP perspective are now starting to fill this gap. Paroutis and Heracleous (2013) interviewed strategy directors in UK based firms in the FTSE (Financial Times Stock Exchange) 100 and discovered that strategy practitioners viewed strategy in four different dimensions: functional - activities that are central to strategising; contextual – where strategising is carried out in an organisation; identity – what it means to be a strategist; and, metaphorical – such as the description of strategy as a journey. Dameron and Torset (2014) interviewed individuals from top, middle and operational areas and identified that practitioners held a range of paradoxical perspectives regarding strategising. The traditional strategy discourse held power over the strategy practitioners but it was also employed by them for their own purposes to protect and enhance their identity and agency.

Despite its relative short history, SAP research has been the subject of a number of reviews which both account for the current status of the field and provide guidance for further research (e.g., Johnson et al., 2007; Jarzabkowski & Spee, 2009; Rouleau, 2013). Recently Vaara and Whittington (2012) comprehensively reviewed the research in the SAP field using the three areas of practices, praxis and practitioners and noted that SAP had significantly contributed to strategic management though they argued that more research was required for the SAP perspective to achieve its potential.

While the SAP approach has grown over the past two decades (Vaara & Whittington, 2012), it has its critics. Carter et al. (2008a) argue that the SAP approach, as presented,

is far closer to mainstream strategy and its industrial economic base than it is to practice theory, likening it to 'a crude version of positivism' (p. 88) in its ambitions to more accurately describe the real world. Chia and MacKay (2007) have a view that SAP lacks cohesion with practice theory and maintain that, despite SAP's focus, methodological individualism dominates research. Carter et al. (2008a) also have a view that actions are labelled 'strategic' because they reflect the set of practices that constitute what is traditionally acknowledged to be strategic management. This view suggests that SAP research may itself be intrinsically linked with the dominant strategic management paradigm, researching only activities that the dominant strategic management paradigm has determined to be strategic. They further suggest, in line with the Foucauldian thinker Veyne (1996), that it may be most beneficial to avoid starting with strategy, as either an object or an activity, but to start with practices and see which events and episodes produce strategic action. It is an interesting conception and part of the debate over the future direction of the SAP field (Vaara & Whittington, 2012; Rouleau, 2013).

SAP authors have, it appears, responded positively to the criticisms. A handbook of SAP was developed in part motivated by the need for a positive response (Golsorkhi et al., 2010a). Vaara and Whittington (2012) identified five directions they believed would help address the criticisms and progress the SAP agenda. These directions consist of: founding agency in a web of practices; giving more weight to the macro-institutional nature of practices; exploring emergence in strategy-making; recognising the role of materiality; and, undertaking more critical analysis. Despite the criticisms and responses, SAP, at the point of writing, is at a crossroads according to Rouleau (2013) and she suggests its foundation of pluralistic approaches may hinder its progress in consolidation. She further suggests that the SAP perspective needs to consolidate while enhancing its diversity and, among a range of suggestions, believes that SAP needs to reinforce its position as an alternative to mainstream strategy research. 'The debate around what strategy is still matters!' (Rouleau, 2013, p. 561).

2.2 STRATEGY PRACTITIONERS AND THEIR DEVELOPMENT

'If we want to understand strategy, we must understand strategists.'

Finkelstein, Hambrick, and Cannella (2009, p. 5)

The purpose of this section is to examine what is currently known about strategy practitioners. Who are these individuals and what is known about them and, importantly

for the focus of this research, how do they develop their strategy practices? The section builds from the previous section of the literature review. First the literature within mainstream strategic management research will be reviewed in relation to what it reveals about strategy practitioners. Whilst some authors (e.g., Jarzabkowski & Spee, 2009; Cunningham & Harney, 2012) have noted that strategy practitioners, as individuals, are all but absent within the mainstream strategic management literature, it is important to examine this extensive body of literature for further clues to their whereabouts. Secondly, the SAP literature will be examined to determine how close the SAP perspective has got to its stated aim of getting close to the world of the strategy practitioner. Third, the role that business schools play in the development of strategy practitioners will be investigated. As the main providers of management education it is expected that they ought to have a significant impact on development. The chapter will close with a summary of what has been learnt from the literature review, creating a foundation and logical point of departure for the continuation of the research.

2.2.1 MAINSTREAM STRATEGY RESEARCH

This section examines strategy practitioners within mainstream strategy research. For clarity, as there are no clear cut boundaries, this research has been conducted within the generally accepted areas of strategy content and process research (Rajagopalan et al., 1993; Mellahi & Sminia, 2009). Strategy content research is typically focused on the 'what' part of strategic management with a focus on the goals, scope and/or competitive strategies of organisations (Fahey & Christensen, 1986). Strategy process research focuses on 'how' strategies are developed or emerge within organisations (Mellahi & Sminia, 2009). The focus of the content stream of research has meant that strategy practitioners, as individuals, are not of significant interest and they have, therefore, been absent from the vast majority of research within this arm of strategic management. It is within strategic management process research that strategy practitioners first became a key focus of the more modern research agenda.

Mellahi and Sminia (2009) argue that process research has its origins in the idea that rational decision making is not backed up by empirical reality. They believe that this discovery can be traced back to the works of March and Simon (1958) and Cyert and March (1963) who were prominent in the influential Carnegie School tradition. Research into the processes that developed strategy revealed a far more confused picture of strategy development that included, for example, internal politics, organisational culture and management cognition (Mellahi & Sminia, 2009). The identification of management

cognition as an influence on strategy formulation meant that individuals, strategy practitioners, became of significant interest to streams of thought within strategy process research.

Initially process research too was relatively uninterested in the role of individual strategy practitioners. Rajagopalan et al. (1993) reviewed the strategy process literature noting that, while there was an increasingly wide range of approaches taken, the majority of the studies adopted theoretical models at a macro or organisational level as opposed to a micro or an individual perspective. This is reflected in the absence of strategy practitioners *per se* from the framework developed by Rajagopalan et al. (1993) and by the inclusion of macro-level criteria related to individuals who, it can be inferred, are strategy practitioners. Examples include Top Management Team (TMT) characteristics, level of political activity and participation/involvement. Process research in the period of the review tended to view strategy practitioners through a collective lens as a group or type rather than as idiosyncratic individual practitioners. Indeed the words 'strategist' and 'strategy practitioner' are not even mentioned in the body of the review authored by Rajagopalan et al. (1993).

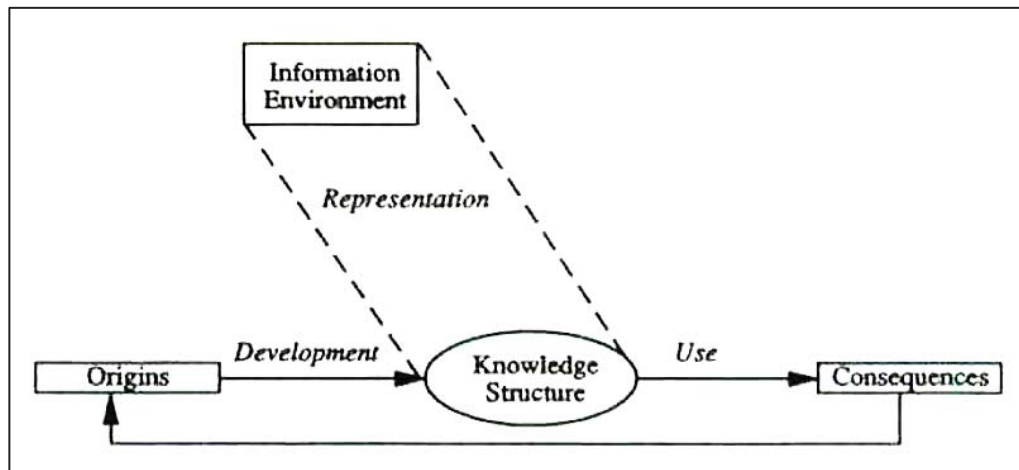
Two related streams of research within mainstream strategic management process research in particular took a greater interest in strategy practitioners. The first stream was the research into managerial cognition that sought to understand the role that mental models of managers had on the strategy formulation and implementation processes (Narayanan et al., 2011). Second was the stream identifying the characteristics of senior executives and top managers and their influence on strategy and organisational outcomes. This research employed the terms 'upper echelons' or, as it became commonly referred to as, TMTs (Finkelstein et al., 2009). These two streams of research sought to explain firm performance in terms of individuals or groups of individuals involved in strategic management.

A familiar theme that has been identified throughout the strategic management literature is that strategic decision making is complex and often involves a great deal of uncertainty and ambiguity (e.g., Schwenk, 1984, 1985; Lyles & Thomas, 1988; Rajagopalan et al., 1993). At the individual level, the managerial/strategic cognition perspective considers that managers spend their time absorbing, processing, and disseminating information (Walsh, 1995). But as many authors have observed (e.g., Starbuck & Milliken, 1988; Walsh, 1995; Weick, Sutcliffe, & Obstfeld, 2005), they face complexity, ambiguity,

imperfect information, misinformation and a sheer volume of information. Due to this, some strategic problems have been called 'wicked problems' distinguished by interconnectedness, complexity, uncertainty within a dynamic environment, ambiguity, conflicting trade-offs and societal constraints (Mason & Mitroff, 1973). Compounding this, the strategic decision process itself is influenced by contextual factors such as environmental, organisational, and decision-specific aspects that significantly influence the strategic decision making process (Rajagopalan et al., 1993). Due to these factors, and given that managers are rational within the limits of their cognitive capacities (Hodgkinson & Healey, 2008), which is a condition now commonly referred to as 'bounded rationality' (p. 290), research into managerial cognition demonstrated that strategy practitioners develop and employ knowledge structures when meeting these challenges (Walsh, 1995). These structures consist of organised knowledge about an information domain and represent the world as the strategy practitioner sees it, facilitating information processing and decision making (Walsh, 1995).

Knowledge structures in a business or management context are simplified representations about how the business environment operates (Gary & Wood, 2011). Logically they develop over time through activities such as education and experience, and act as information filters, directing individuals' attention toward information which is considered important (de Wit & Meyer, 2010). Allison (1969), in his analysis of the Cuban missile crisis, observed that an analyst's basic frame of reference determined not only which questions to answer but which ones to ask. In this regard, knowledge structures can be a two-edged sword, allowing individuals to act quickly but, on the other hand, they can also be dangerous because blind spots and bias can easily develop (Gioia, 1986; Walsh, 1995). Knowledge structures are, therefore, employed as a means of understanding, interpreting and framing problems in a way that makes sense to the individual strategy practitioner (Kaplan, 2008). Walsh (1995), in his comprehensive review of the managerial and organisational cognition domain, developed a high-level model, displayed in Figure 2.7, to encapsulate the fluid nature of the relationship between the origins of knowledge structures and the feedback loop from experiencing and observing the consequences of using these knowledge structures in practice.

Figure 2.7 – Knowledge structure research: An organising framework.



Source: Walsh (1995, p. 282).

Whilst it seems logical that an individual's knowledge structure is the culmination of events and experiences that relate to a particular knowledge domain, Walsh (1995) observed that few knowledge structure theorists understand how such structures are formed. He added that scholars interested in the topic such as Brewer and Treyns (1981) Neisser (1976), and Rumelhart (1980), all note that researchers' understanding has been limited mainly to the simple assertion that knowledge structures are formed by experience. Furthermore, it is generally accepted that knowledge structures develop imperfectly and, crucially, are an individual's idiosyncratic representation of the area rather than an authentic or correct representation (Walsh, 1995). This is an important point as it means that the knowledge structures of two individuals involved in a strategic planning initiative or attending a strategic management course will be different, in all likelihood substantially different. While each participant may receive a similar physical experience, individuals' interpretation of the experience will be dissimilar. This highlights a danger of using broad demographic variables to group individuals together. It logically follows that not all individuals with, for example, an MBA, an economics degree or ten years' experience in management will have the same, or potentially even similar, knowledge structures concerning strategic management. The importance of this point will be returned to when the literature on TMTs is examined later in this section.

An important contribution towards acknowledging the role of managerial cognition in shaping strategic outcomes was Porac, Thomas, and Baden-Fuller's (1989) research into the Scottish Knitwear firms (Kaplan, 2011). They were able to demonstrate that the structure of an industry is a cognitive construction based on managerial perceptions

(Porac et al., 1989). Kaplan (2011) noted that the article played a key part in bringing the focus back to individuals and managers rather than the economic, organisational or industry level analysis which was dominating strategy research during the 1980s and 1990s. In a similar vein, Stubbart (1989) called for cognition to be taken seriously, arguing that strategic cognition (strategic thinking) was a crucial 'missing link' in strategy.

In building on Walsh's (1995) review of managerial cognition, Narayanan et al. (2011) conducted an in-depth review on the strategic cognition perspective focusing specifically on cognition and the decision processes in strategy formulation and implementation. They noted that strategic cognition was now a distinct stream within the strategic management field that highlighted the role of human agency in strategic management. In this regard they observed that the strategic cognition field had strong linkages with the SAP perspective (Narayanan et al., 2011).

Three important points in regard to this research are developed in the Narayanan et al. (2011) review regarding strategy practitioners. Firstly, they concluded that during decision-making, cognition has a significant influence on the framing of decisions before a strategic decision is reached. In other words, strategy practitioners, their knowledge structures and how they 'see' the world are an important factor in strategic decision making. Second, Narayanan et al. (2011) noted that strategy cognition researchers view implementation as an important part of strategic management, highlighting the importance of Weickian (1995) sensemaking (the way individuals create sense for themselves based on the information available) and sensegiving (concerned with attempts to influence outcomes and communicate their thoughts) in strategy implementation and strategic change (Gioia & Chittipeddi, 1991; Rouleau, 2005; Weick et al., 2005). Third, Narayanan et al. (2011) concluded that demographic variables do not explain strategic cognition satisfactorily, leaving an incomplete picture regarding development of the knowledge structures of strategy practitioners. Kaplan (2011) echoed this last point, noting that research into managerial cognition suggests that demographic variables were weak approximations of cognition. This third point appears a valid criticism of the use of demographic variables as proxies for cognition in the TMT tradition, which will be examined shortly.

The strategic cognition field recognised that managers, the field's apparent surrogate for strategy practitioners, are vital in terms of their impact on strategy formulation,

formation and implementation. Therefore, understanding how strategy practitioners develop their knowledge structures is an important factor, or should be. Walsh (1995) wrote:

Researchers must uncover the developmental origins of the knowledge structure if it is shown to have an impact of some consequence. Development, of course, implies a recursive relationship with use. Researchers need to understand how knowledge structures develop so they can guide training or remedial change efforts if the use of a particular knowledge structure is found to promote either beneficial or deleterious organizational consequences. (p. 282)

Narayan et al. (2011) adapted and extended the framework developed by Rajagopalan et al. (1993) and included an additional antecedent factor, a factor that exists prior to the episode of strategic management that impacts the process and/or outcomes. They labelled this factor 'individual factors' giving the examples of educational background, experience, decision style, and personality factors. Although this factor bears a striking resemblance to simple demographic variables, it appears to be a research area that has gained significant momentum within strategic cognition research. Narayan et al. (2011) concluded that an incomplete picture remains of the development of practitioner knowledge structures.

In summary, there has been extensive research on managerial and strategic cognition, establishing these as critical aspects in the formulation and implementation of strategic management. The area that remains under-researched involves the antecedents, or determinants, of managers' knowledge structures (Finkelstein et al., 2009, p. 69; Narayanan et al., 2011). This refers to how strategy practitioners develop their idiosyncratic view of strategy, including the practices they employ.

The second major stream of research that focused on strategy practitioners was research into Top Management Teams (TMTs). This stream is often included within the strategy cognition literature but it established itself as a separate theoretical perspective from the mid-1980s through works such as *The General Managers* (Kotter, 1982) and Hambrick and Mason's (1984) seminal article on 'upper echelons' (Finkelstein et al., 2009).

Strategy cognition researchers in the 1970s and early 1980s viewed strategic decision making as an activity influenced by individuals and, therefore, started studying high-

ranking managers, namely CEOs, as the 'primary shapers of strategic direction' (Finkelstein et al., 2009, p. 8). Finkelstein et al. (2009) noted that the 1980s then saw a progressive interest in TMTs, as opposed to individuals, as researchers realised that strategic decision making is often a shared activity rather than the domain of the lone CEO. Researchers, therefore, moved beyond a focus on CEOs and focused on the top leadership group within an organisation. A core assumption of TMT research is that executives and TMTs are important in determining strategic direction (Hambrick & Mason, 1984; Hambrick, 2007) and the TMT approach viewed strategic management (sometimes termed strategic choice or strategic leadership) as a function of the demographic and psychological composition of the TMT (Hodgkinson & Healey, 2008). In other words, it viewed the experiences, values, and personalities of executives as important in determining how they made strategic decisions (Hambrick, 2007) and employed demographic variables to capture these characteristics.

The foundation of the TMT research stream is normally credited to Hambrick and Mason's (1984) seminal paper (Carpenter, 2011) that looked at decision making in terms of the 'dominant coalition' (Thompson, 1967) in organisations, what they originally termed upper echelons. Hambrick and Mason (1984) argued that an organisation's performance was linked to the 'values and cognitive bases' (p. 193) of executives in the organisation. They viewed the characteristics of individuals in TMTs from what they termed 'cognitive base values with an observable perspective' (p. 193), for example, the age of the manager or their tenure in the organisation or industry. Michel and Hambrick (1992) cited the advantages of objectivity, parsimony, and possible replication as key advantages for the use of these variables. Hambrick and Mason (1984) developed 21 propositions and called on the research community to take up the challenge of researching this perspective, which they subsequently did with enthusiasm.

The TMT, or upper echelon, theory holds that executives' experiences, values, and personalities have a significant influence on their interpretation of strategic situations which affects their strategic choices (or thinking and decision-making) (Hambrick, 2007). The goal of TMT research, therefore, appears to be focused on determining the right mix of individuals and backgrounds for effective TMT strategic management. The determination of this will enable effective TMTs to be selected, presumably resulting in superior organisational performance. This amounts to the establishment of a cause-and-effect hypothesis between TMT composition and organisational performance. At the time, Hambrick and Mason (1984) expected, somewhat optimistically, that relatively

straightforward demographic variables may be potent predictors of strategies and performance.

It must be remembered that, three decades ago when Hambrick and Mason (1984) published their paper, the strategic management field was in the process of seeking greater academic legitimacy through the application of science-based research (Grant, 2008; Hambrick & Chen, 2008). The argument for the use of demographic variables was, therefore, set in a period when the use of quantitative variables, such as those employed in the TMT field, was preferred, if not demanded, by academic faculty and publishers (Hambrick & Chen, 2008). The flow-on effect of this conviction can be seen in Molina-Azorín's (2009) study that in the period 1997–2006, only eight percent of empirical articles in the *Strategic Management Journal* were purely qualitative studies.

The period following Hambrick and Mason's (1984) seminal paper saw an increase in research into the relationships between executives' observable background characteristics and organisational outcomes (Finkelstein et al., 2009). The demographic variables researchers primarily used, which accounted for the majority of the literature (Finkelstein et al., 2009), were tenure (e.g., Gabarro, 1987; McDonald & Westphal, 2003), functional background (e.g., Hayes & Abernathy, 1980; Michel & Hambrick, 1992), formal education (e.g., Grimm & Smith, 1991; Hambrick, Cho, & Chen, 1996) and international experience (e.g., Michel & Hambrick, 1992; Carpenter & Fredrickson, 2001). Experience gained through tenure, functional background and international experience are examples of learning from practice, what executives have learned 'on-the-job' or 'from-the-job'. Formal education, on the other hand, implies gaining knowledge from a tertiary institution, most likely, but not necessarily confined to a business school.

The TMT stream of research uncovered interesting insights into the relationship between TMTs and strategic management and it remains an active field of research today. Books summarising the field's contribution have been published (Finkelstein et al., 2009; Carpenter & Weikel, 2011) noting that there is ample cumulative evidence from the fields of management, psychology and financial economics that executives have a significant impact on organisational performance. This, on the surface, may seem quite obvious, given the position and power that executives and managers typically have in organisations, but TMT research was in competition with alternate views such as the RBV, population ecology and that of institutional theorists whose studies (e.g., Lieberman

& O'Connor, 1972; Salanick & Pfeffer, 1977) indicated that executives accounted for only a small percentage of performance outcomes (Finkelstein et al., 2009).

One of the main criticisms levelled at TMT research stemmed from the use of demographic variables, which were seen as overly simplistic (Markóczy, 1997; Priem, Lyon, & Dess, 1999). Due to the perceived difficulties involved in studying the mental representations and psychological characteristics of executives (Hambrick & Mason, 1984), the so-called 'black box', these indirect methods of cognitive assessment were used as proxies for cognitive variables. As Winner (1993) suggests, the term 'black box' refers to a device or system that, for convenience, is described solely in terms of its inputs and outputs. What goes on inside the black box is either unknown, unknowable or deemed irrelevant as long as it performs certain valuable functions. When voicing her doubt that the use of these proxy input variables was adequate, Markóczy (1997, p. 1240) noted that relying on convenient substitute variables is problematic and that they may turn out not to be particularly good substitutes. Priem, Lyon, and Dess (1999) went further in their critique of the methods employed concluding that, when proxy variables are employed without the intervening constructs of TMT processes, attitudes and judgments, 'incomplete and error-prone conclusions, devoid of understanding, are likely' (p. 950). In a 2007 review of the field, a founder of the TMT stream of research Hambrick (2007) noted that it was essential to open the 'black box' to improve the insights able to be provided by the research community.

One study of interest within the TMT field that examined deeper variables and constructs than demographic variables was that by Breene et al. (2007). They surveyed Chief Strategy Officers (CSOs) in large global companies and followed up with 'some' in-depth interviews. They observed that CSOs are diverse and do not emerge from predictable backgrounds with easy-to-map career paths. Their skills, experiences, best practices, and preferences are equally diverse. This study, as published in the *Harvard Business Review* – a popular management magazine (Kieser et al., 2015) – does not, however, provide an in-depth discussion on how the data was obtained and analysed; state how many interviews were conducted; or provide any information about participants and, as a result, it is difficult to assess this research against other studies, though it has been commonly cited (e.g., Angwin et al., 2009; Clegg et al., 2011; Whittington et al., 2011).

This use of proxy variables has been recognised as a limiting factor in the general acceptance of research into TMTs (Markóczy, 1997; Priem et al., 1999; Carpenter &

Fredrickson, 2001; Carpenter & Weikel, 2011) but there were also other concerns noted. Ketchen, Boyd, and Bergh (2008) observed that the methods such as surveys used to tap into executives' motives, preferences, and decisions are limited in their ability to 'capture these nuanced phenomena' (p. 652). The use of broad groups such as MBA students, is also potentially problematic and, in a recent study of managerial cognition using MBA students, Gary and Wood (2011) noted substantial variation in the accuracy of the students' mental models and in performance. This seems logical as individuals pursuing an MBA degree may have come from a wide variety of backgrounds, but MBA students are repeatedly used in a number of studies (e.g., Useem & Karabel, 1986; Palmer & Barber, 2001; Bertrand & Schoar, 2003), presumably because the advantages of access outweighs the disadvantages involved.

The TMT stream of research added knowledge of strategy from a formulation perspective and it helped shift attention to the impact that individuals have on strategy. However, the majority of the research explored the effects of TMT characteristics at a group level on the strategy process and its outcomes (Hutzschenreuter & Kleindienst, 2006) and there has been little research that looked at how individual TMT members, the strategy practitioners, developed their practices. Whilst access to demographic variables is relatively straightforward compared to research designs that seek more in-depth information on strategy practitioners, the basic assumption that strategy practitioners can be 'pigeon-holed' by their demographic characteristics appears to be problematic (Markóczy, 1997; Priem et al., 1999). Barr, Stimpert, and Huff (1992) noted that it was the attitudes and beliefs of the executives they studied that had a greater influence on strategic decision making than their demographic characteristics. This is in line with the previously discussed reviews of the strategic cognition domain which has cast doubt over whether demographic variables are sufficiently explanative (Kaplan, 2011; Narayanan et al., 2011).

Top Management Team researchers see the use of demographic variables as a fruitful, but limited, methodological approach and have taken steps to address the criticisms directed at that approach (Clark & Maggitti, 2011). Despite examples that broadened the TMT research agenda through adopting qualitative research methods (e.g., Eisenhardt & Bourgeois, 1988) few studies in this vein have actually been published (Clark & Maggitti, 2011). More recently there has been an attempt from TMT researchers to open the 'black box' through the use of personality profiles (Carpenter, 2011). Sangster (2011), for example, employed a Five Factor Inventory survey instrument and Peterson

and Zhang (2011) used a 24-item Psychological Capital survey in studying TMT effectiveness. While this does, arguably, move inside the realm of the practitioner's black box, it appears to do so in a broad manner and whether these types of approach will be able to capture the essence of this 'nuanced phenomena' is still debatable (Ketchen et al., 2008, p. 652).

Despite the steps taken by TMT researchers to address criticisms, according to Clark and Maggitti (2011) TMT research is again at a crossroads requiring researcher ingenuity and different methodologies to generate knowledge. The volume of research adopting a TMT perspective, though, appears to remain strong, as Hambrick (2007) noted when he updated the perspective in 2007. Carpenter (2011) more recently observed that 'interest in the upper echelons shows no sign of slowing down' (p. 2).

One area in which TMT research has yet to become focused is how members of TMTs gain their expertise. While Finkelstein et al. (2009) noted that substantial work needs to be done on the development of managers' cognitive models, this appears to sit outside the main focus of the TMT research stream which appears to remain focused on group level TMT characteristics. A recent example of this focus is the Menz and Scheef (2014) study of whether the presence of a Chief Strategy Officer on a TMT influenced firm performance. They concluded it did not but as Angwin, Paroutis, and Mitson (2009) noted, the positions of Strategy Directors are more fluid than conventional schema can show and, therefore, their influence is likely to be nuanced. In other words the influence of Strategy Directors is likely to be grey, not black or white.

In summary, mainstream strategic management research divided arguably into two major branches and it was within the branch interested in how strategies form, strategy process research, that strategy practitioners became of greater interest. Two related streams of research in particular, strategic/managerial cognition and TMTs, focused on the role of individuals in the strategy process. However, the majority of this research treated strategy practitioners either as a type, or what the SAP literature refers to as an aggregated actor (Jarzabkowski & Spee, 2009): CEOs, CSOs, TMTs, Executives and senior managers. Indeed the identification of strategy practitioners was heavily associated with job title and the research into TMTs almost exclusively, as the name implies.

Despite the focus on strategy process, and with it a greater focus on strategy practitioners, there still remains a gap in the field's understanding of how strategy

practitioners develop their practices. Strategy process research has helped to humanise the strategy field but the active role of the individual in strategy formulation remains understated (Chia & MacKay, 2007). Within mainstream research it remains an area that is often identified as one where additional research is required (Walsh, 1995; Gavetti, Levinthal, & Rivkin, 2005; Gary & Wood, 2011; Narayanan et al., 2011).

2.2.2 PRACTITIONERS IN THE STRATEGY AS PRACTICE PERSPECTIVE

Interest in SAP research grew out of a dissatisfaction with the failure of mainstream strategy research to include strategy practitioners as human actors. The purpose of this section is to review the literature within the SAP perspective with a focus on strategy practitioners. For the purpose of this research, these individuals are purported to be a key area of focus for the SAP perspective (Whittington, 2006; Jarzabkowski & Spee, 2009).

It is argued (e.g., Johnson, Melin, & Whittington, 2003; Jarzabkowski & Spee, 2009) that SAP has grown in response to the absence of human actors, as living breathing individuals, and their activities in most academic articles on strategy. To facilitate this, Jarzabkowski and Whittington (2008c) considered that what is needed is an 'intimate understanding of the practice that identifies a practitioner as a competent strategist' (p. 283). This may be an ambitious undertaking given the perceived difficulty in assessing competence, but it is, therefore, those who do the work of making, shaping and executing strategies (Whittington, 2006) that are a key area of focus for the SAP field. Furthermore, unlike the focus within mainstream research which tends to be on the CEO or senior managers, the SAP definition of who is a strategy practitioner is much wider and includes senior managers, consultants and middle managers as well as external practitioners such as policy-makers, the media, gurus and business schools (Jarzabkowski & Whittington, 2008b; Vaara & Whittington, 2012). Importantly within the SAP perspective, and the practice theory tradition more generally, strategy practitioners are viewed as social beings entwined within a social context (Vaara & Whittington, 2012).

While the SAP perspective has emerged relatively recently in the strategic management academic field, it has already been the subject of a number of reviews (Jarzabkowski et al., 2007; Jarzabkowski & Spee, 2009; Vaara & Whittington, 2012; Rouleau, 2013) and books (Jarzabkowski, 2005; Johnson et al., 2007; Golsorkhi et al., 2010b). The academic contributions focused both on reviewing the current state of the perspective and on discussing and defining the perspective and research agenda. This may be in part due

to criticisms, discussed previously, as SAP sought to establish itself firmly as a viable stream within the strategic management community. It is important to note that, while SAP is relatively new within academia, in the popular management domain there is an extensive range of biographical and autobiographical accounts that provide glowing accounts of strategy practice and wisdom, an aspect that will be discussed shortly.

Jarzabkowski et al. (2009) recently reviewed SAP and categorised the theoretical and empirical research into domains using a three by three matrix based on the type of practitioner (individual actor, aggregate actor, extra organisational actor) and level of praxis (micro, meso, macro). This is displayed pictorially in Figure 2.8.

Figure 2.8 – Typology of SAP research.

Level of praxis	macro	C n Empirical = 1 n Theoretical = 0	F n Empirical = 1 n Theoretical = 2	I n Empirical = 1 n Theoretical = 8
	meso	B n Empirical = 3 n Theoretical = 0	E n Empirical = 16 n Theoretical = 0	H n Empirical = 1 n Theoretical = 0
	micro	A n Empirical = 6 n Theoretical = 1	D n Empirical = 6 n Theoretical = 0	G n Empirical = 0 n Theoretical = 0
		individual actor within organization	aggregate actor within organization	extra-organizational aggregate actor
		Type of practitioner		

Source: Jarzabkowski and Spee (2009, p. 74).

The studies in this review which focused on the strategy practitioner as an individual actor, although limited in number, provided a range of new insights into the world and practices of strategy practitioners. Researchers such as Samra-Fredericks (2003) through ethnographic and conversation analysis; Rouleau (2005) employing a single case design; and, Beech and Johnson (2005) through narrative analysis brought strategy practitioners to life in their articles by giving them voice and primacy, for example:

This market is very tough you have to fight for your 15%. You've got to fight and claw and bitch to get it and it's that urgency which is being forced upon us by Alex. We needed a different management style and we've got it. The reason we went off and hired Alex, rather than to be perfectly blunt, was because he has got that attitude and I don't. Well, that's life. Thank god he's here, if it was left to Royston and me, we'd spend the whole time fiddling around (Benjamin). (Beech & Johnson, 2005, p. 37)

They allowed their readers not only into the data, but into the conversations and the world of strategy practitioners. This approach can be contrasted vividly with the TMT approach where executives are grouped by demographic variables which provides little insight into them as individuals. Words such as 'fight', 'claw' and 'bitch' and the phrase 'thank god' allows the strategy practitioner to be understood as a human involved in difficult and demanding work.

Within the SAP research, Vaara and Whittington (2012) identified and reviewed a sub-stream that was focused on the role and identity of strategy practitioners. They noted the research deviated from mainstream research and its primary focus on senior managers by identifying a range of different strategy practitioners including consultants and middle managers. The Vaara and Whittington (2012) review captured the current state of research on practitioners within the SAP tradition, highlighting a range of exemplar studies. Of interest, studies showed that strategic planners are not, as the dominant strategic management paradigm would suggest, top-down formulators and controllers of strategy, but require political, training, coaching and negotiating skills (Paroutis & Pettigrew, 2007; Angwin et al., 2009; Whittington et al., 2011). This is similar to the findings of Breen et al. (2007) whose research into CSOs reported that strategy practitioners considered themselves primarily doers with the mandate, credentials, and desire to act rather than simply advise. In addition, the focus on middle managers provided greater attention on those implementing strategy (e.g., Mantere, 2005, 2008; Rouleau & Balogun, 2011) showing their importance in sensegiving (Rouleau, 2005). Other studies were able to employ relatively unique methods, for the study of strategy that is, for getting closer to the thoughts of strategy practitioners. Heracleous and Jacobs (2008), for example, used embodied metaphors to access strategy practitioners' conceptions of organisational levels and were able to gather interesting insights such as portraying the CEO as a 'headless chicken' or the 'king of the castle' that allowed insight into the relationships and dynamics within the organisation.

Employing discursive and narrative methodologies and methods appears to be a significant avenue of interest to SAP researchers to highlight the role that discourse and narrative, or storytelling, has in the enactment of strategic management (e.g., Knights & Morgan, 1991; Barry & Elmes, 1997). Recent examples include that by Laine and Vaara (2007) who employed a discursive struggle perspective and identified how actors employed a certain strategy discourse to take control, maintain room for manoeuvre, or keep their organisational identity. Beech and Johnson (2005) used narrative analysis as a way to research the micro level dynamics of identity during strategic change and found that individuals' identities were affected during the process of strategic change.

A review of SAP studies focused on strategy practitioners reveals that the majority have their prime interest in the activities and outcomes of strategy practitioners. This is unsurprising given the field's focus on practice. No studies were able to be identified within the recognised SAP literature with a focus specifically on the development of strategy practitioners, despite it being recognised as an area of interest (Hendry & Seidl, 2003; Whittington, 2006). Whittington's (1996) foundational article observed that 'we do not know the different skills strategy consultants, planners and managers actually use, *or how they acquire them*' (p. 734, italics added). Whittington's (2006, p. 626) subsequent call, 'given the investments involved, how strategy practitioners are best produced is an urgent research question' indicates that interest in this area is significant, yet it is a research area that has yet to be studied. In some regards, the situation echoes Walsh's (1995) observation that it has been established that the practices of strategy practitioners, as well as the development of their mental representations, are shaped by experience. What remains to be learnt is the nature of the experiences behind this development. Again borrowing from Walsh's (1995) observations, an understanding of how strategy practitioners develop could influence training or education if it could be demonstrated what experiences promoted beneficial or harmful consequences.

Indeed, the interest in, and discussion on, the development of strategy practitioners is somewhat extended by the introduction of the suggestion from the SAP literature that strategy is similar to professions like law and medicine (Whittington, 2007; Whittington et al., 2011). The idea that the strategic management field 'employs, develops, licenses and spreads particular practices and particular kinds of practitioners' (Whittington, 2007) seems one that may, or has, reified the *status quo*, the dominant strategic management paradigm, an aspect to which the SAP research agenda sees itself as an alternative (Golsorkhi et al., 2010a). Hay and Hodgkinson (2008, p. 23) note that 'implicit to such a

professional model is a view that managing is a rational, neutral and disinterested activity, as articulated by technician thinking'. Carter et al. (2008a) put forward an alternative view. Instead of assuming that those in senior positions have been 'licensed', it is through a mastery of the rituals and practices of strategy that the status of strategy practitioner may be accorded. In other words it appears to be something earned, akin to respect, rather than something that comes with a job title or degree (or MOOC⁵ certificate). The debate over whether strategic management should, or could, be a profession (Khurana & Nohria, 2008) or is more akin to a craft (Mintzberg, 2003) will be discussed in relation to the impact of business schools later in this chapter.

The lack of studies focused on how strategy practitioners develop their practices appears to make them ahistorical. As is depicted in Whittington's (2006) integrated framework, strategy practitioners appear fully formed, ready to engage in episodes of strategy praxis. Without an understanding of their career development and history it appears the *only* way they can be viewed is as a relatively homogenous group by virtue of all being strategy practitioners, paradoxically the very position the SAP perspective sought to avoid at the outset.

Before summarising this section, an important argument from a practice theory perspective needs to be introduced, and this is whether strategy practices reside in the individual practitioner or are 'trans-individual' (Chia & MacKay, 2007, p. 228). Barnes (2001) provides a good analogy, when presenting practice as a collective action, with riding in formation. This is a complex practice which he argues does not occur because people are individuals with similar practices. It is able to occur because people are orientated to each other in a way that produces the overall practice. Therefore, a practice, it can be argued, refers to a 'shared possession of a collective' (Barnes, 2001, p. 25) or a shared practical understanding (Schatzki, 2001). Rasche & Chia (2009) note that while practice theorists use a range of terms to describe this phenomenon, for example 'habitus' (Bourdieu, 1985), there is general agreement amongst practice theorists that they exist. It is this concept that Chia and MacKay (2007) argue is important for the SAP perspective as it changes the primacy of research from individuals to practices. As opposed to ascribing primacy to individual actions (methodological individualism), as SAP primarily does according to Chia and McKay (2007), strategy is

⁵ MOOC – Massive Open On-line Course

the result of individual predispositions reacting to a particular episode of praxis (Chia & MacKay, 2007).

While SAP states that it wants to distance itself from methodological individualism (Vaara & Whittington, 2012) and, therefore, mainstream strategy process research, it appears that it retains strong ontological attachments (Chia & MacKay, 2007). Rouleau (2013) notes that even though the social practice label is used, few studies have been able to focus on doing strategy in the true practice turn sense. This appears to leave the SAP perspective, as Rouleau (2013) suggests, at a crossroads.

In summary, the SAP literature that has focused on strategy practitioners is diverse and enlightening. A range of methodologies have now been embraced and the result has been a wide range of insights into strategy and strategic management. One key area, and the area of interest for this research, is how strategy practitioners develop their practices. That area is one that the SAP field is yet to address in depth despite the goal, stated a decade ago, to understand more about strategy practitioners (Whittington, 2006).

The result of the review of literature in the strategic management field to this point, including the previous section on mainstream strategy research, indicates that little is known about how strategy practitioners develop their practices. Within mainstream strategic management research, the human actor is mainly absent or reduced to a set of demographic variables (Jarzabkowski & Spee, 2009) and within SAP research there has been little empirical research on practitioner development with the main focus being how strategy practitioners practise.

As there seems to be little research that focused on strategy practitioners and how they developed their practices it is, therefore, the 'supply side' that now becomes the focus of this review. In line with the area of interest for this research, the impact that business schools, as the supposed core suppliers of strategic management education, have on strategy practitioner development is now explored.

2.2.3 BUSINESS SCHOOLS AND PROFESSIONS

'In 1995, management gurus Michael Treacy and Fred Wiersema secretly purchased 50,000 copies of their business strategy book *The Discipline of Market Leaders*. The stores they purchased from were those whose sales are monitored to select books for the *New York Times* bestseller list. Despite mediocre reviews, their book made the bestseller list. Subsequently, the book sold well enough to continue as a bestseller.'

Bikhchandani, Hirshleifer, and Welch (1998, p. 151)

The purpose of this section is to examine the impact business schools have on practitioner development and the aligned area of interest, the professionalism of strategic management. The term 'professional' is being used in this context in relation to the debate over whether strategic management should, or could, be a profession similar to law or medicine. This section of the literature review will be predominantly focused on the management field, as opposed to specifically strategic management, as this is the level where the majority of literature is located. Where appropriate, specific areas relating to the strategic management literature will be introduced into the review.

At this point it is important to describe the link between business schools and management education as they are used in this thesis. Employing the definition used by Jarzabkowski, Giulietti, Oliveira, and Amoo (2012), management education is focused on developing an 'individual's knowledge through an exposure to academic content and social interactions with other programme attendees' (p. 6). Business schools, which are typically associated with a university (Engwall, 2007), are viewed as the primary institution that provides management education and, therefore, management education is a product of business schools. The term management education when discussed in the literature typically includes all products of business schools, although Lockhart (2013) argues that the products are more often than not discrete.

In addition to research outputs (i.e., knowledge), business schools primarily produce three products: undergraduate courses, postgraduate courses (most typically dominated by the MBA degree) and executive education which are shorter courses focused on the development of executives. While these three products are focused on different customers, the literature often focuses discussion on business schools at an institutional level (Pfeffer & Fong, 2002, 2004; Currie, Knights, & Starkey, 2010) or just the MBA product (Mintzberg, 2003; Charlier, Brown, & Rynes, 2011; Datar, Garvin, & Cullen,

2011). The impact of business schools on practitioner development features, albeit briefly, in both these contexts.

Business schools have a long history and have developed and evolved alongside management theory, thinking and practice. European universities were arguably the first to see the need for a focus on business in the eighteenth century but it wasn't until the 1850s that the first schools started to appear (Engwall, 2007). Early business schools such as Wharton (1881), Dartmouth (1900) and Harvard (1908) were influenced by the scientific approach to management, predominantly Fredrick Taylor (Freedman, 2013), now infamous for the term Taylorism referring to a scientific approach to management that had little regard for people except as factors of production. A review of the history of business schools (for a discussion see Mintzberg et al., 1998a; Segal-Horn, 2004; Freedman, 2013) shows that their evolution was influenced considerably by academic and practitioner thinking featuring prominent names such as Barnard, Drucker, Ansoff, Andrews, Mintzberg and Porter.

In the 1950s, graduate business education was virtually non-existent, with approximately 3,000 MBA degrees awarded in the United States of America, but by the late-1990s this number had grown to over 100,000 (Zimmerman, 2001). Strategy courses became standard within business schools and grew rapidly from the 1980s (Mintzberg, 1998) as did the number and size of business schools, becoming a significant and lucrative industry for the business schools themselves and their faculty (Pfeffer & Fong, 2002). Britain consciously imported the American Business School model through the formation of the London and Manchester Business Schools in the 1960s, and by 1990 had 31 business schools (Lockhart & Stablein, 2002). Business schools were a little slower to be introduced into New Zealand and Australia but now nearly every university in these countries has a business school attached (Lockhart & Stablein, 2002).

The globalisation of management education was led by American thinking and structures (Starkey & Tempest, 2001; Engwall, 2007). MBA programmes, which powered the boom of business education in the 1980s and 1990s (Mintzberg, 2003) were, according to Zimmerman (2001), based on highly abstract and impractical basic research of 1960s and 1970s America. The focus of business school thinking on economics as the basis for understanding strategy is attributed to Michael Porter's work in the 1980s, notably the publication of the best-selling book *Competitive Strategy* (Mintzberg, 2003). Business schools willingly embraced Porter's view (Mintzberg, 2003) and this, as has been

discussed, became a key aspect of the dominant strategic management paradigm which still maintains a strong focus on economics and rational planning. The majority of business schools in Greiner et al.'s (2003) study revealed that the course content of strategy courses emphasised theory and analytics over practice, and Liang and Wang's (2004) study demonstrated, via a study of case studies taught in business schools in America and China, that the dominant mental model of business schools is rationalistic and analytic. European business schools were also heavily influenced by the American business school model post World War Two and have only recently, from approximately 1997, started returning to a more cultural, societal and interdisciplinary focus and pedagogy (Kaplan, 2014).

The literature suggests that strategic management pedagogy appears to have altered little since the mid-1980s. Oviatt & Miller (1989) wondered why, if managers and business schools are so far apart and prominent critics have proposed ideas for solving the problem, so little has changed. In this period, and previously, the American business school model was highly influential and dominated thinking (Kaplan, 2014), with Leavitt (1989) noting that MBA programmes were very much alike, having gradually converged around a few key ideas born in the fifties. Kachra and Schnietz's (2008) review of MBA strategy courses noted that the structure of the traditional MBA strategic management course has remained relatively unchanged over the past 20 years, favouring a detached analytical approach to the formulation of strategy.

Insight into this inertia can be found in research conducted by Stambaugh and Trank (2010) who examined how new research is integrated into textbooks. Researching how institutional theory research impacts on strategic management textbooks, they observed that the 'manager-centric, behaviourist and micro-economic bases' (pp. 673-674) of most texts may be evidence that strategic management pedagogy and its discourse are institutionalised. Tengblad and Vie (2012) went one step further and suggested that in some academic areas, including strategic management, there seemed to be a systematic neglect of managerial work and behavioural research.

The number of individuals graduating with an MBA has become a recognisable global phenomenon. Curiously, it appears that knowledge regarding the number of MBA students that graduate each year is vague as very little research has studied such basic questions (Murray, 2010). Murray (2010) analysed the US market and estimated that 100,000 MBA degrees were awarded annually in the United States of America, a figure

in line with Zimmerman's (2001) estimate. A study from India noted that there were approximately 360,000 MBA graduates annually from the 4,500 business schools (Gayathridevi & Deepa, 2014) and this provides an idea of the immense size of the global market when factoring in all the other countries that offer MBAs.

With significant numbers of graduates emerging from business schools, and executives engaging in management education, it is surprising that little evaluation of the impact of business schools on the practice of management (or strategic management) has been conducted (Pfeffer & Fong, 2002). Jarzabkowski and Spee (2009) noted there has been little empirical attention to the diffusion of the practices taught through management education or to the use of these practices during episodes of strategy praxis. Pfeffer and Fong (2004) noted that the research appeared more centred on the question of economic returns for MBA graduates with, they note with a degree of cynicism, the focus of this research possibly inspired by the business schools themselves attempting to encourage enrolment and justify expensive fees.

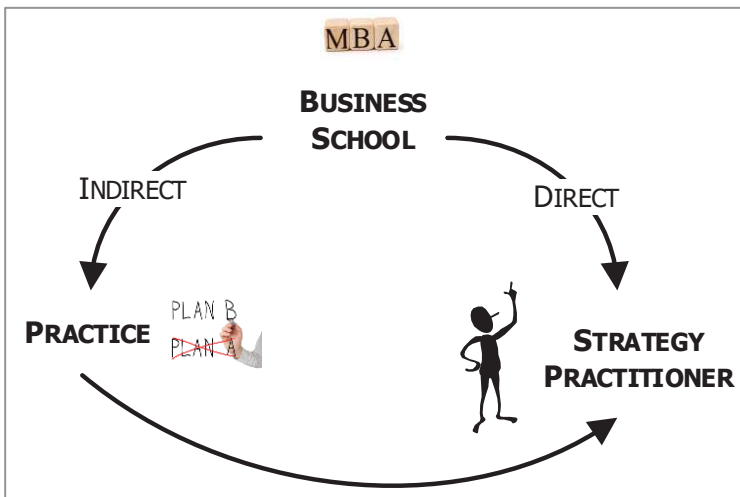
The MBA degree and its impact on practitioner development has been the subject of a stream of research. Research focusing on the direct impact of MBA education on management practice observes that there is, indeed, evidence of such impact, indicating that a level of knowledge transfer has occurred (Jarzabkowski et al., 2012). This has not, however, been observed consistently (e.g., Shipper, 1999). Hay and Hodgkinson (2008) found that obtaining an MBA was more valuable than critics generally contend, a finding similar to Simpson, Sturges, Woods, and Altman (2005). Shipper (1999), on the other hand, found no discernible difference between the skills of MBA and non-MBA managers. Rubin and Dierdorff (2009) noted in an American-based study that the behavioural competencies indicated by managers to be most critical are least represented in core MBA curricula. One particularly relevant study was conducted by Benjamin and O'Reilly (2011) who interviewed recent MBA graduates and found that there was a disjunction between MBA programme focus and the typical situations encountered in practice leading graduates to fundamentally change the way they thought about, and practised, leadership.

A related area of research that has recently focused on the effect of business schools on practice has been in the area of the impact of strategy tools on practice. Balogun et al. (2014) note that this is part of the increased interest in the sociomaterial aspects of strategy making such as the use of tools, locations, and spatial arrangements. Wright,

Paroutis, and Blettner (2013) argue that the potential usefulness, or otherwise, of strategy tools in practice is at the heart of the relevance of business schools debate. Jarzabkowski and Kaplan (2014) note that this literature suggests that managers use tools to support their situation analysis and decision making although the tools and processes are often adapted dependent on context (e.g., Grant, 2003; Jarratt & Stiles, 2010). The study by Jarratt and Stiles is of interest because it identified three differing approaches to strategising among participants: routinised practice, reflective practice and imposed practice that depended on the competitive strategy perspective held and the view of operating conditions (in terms of stability). The observation that the participant's perspective of competitive strategy was a factor indicates that the background of practitioners is important. Jarratt and Stiles also noted that in some situations practice reflected lessons learned in educational institutions.

These areas of research into the impact of business schools seldom focused on how practitioners develop their practices. A focus on MBA students or the outcomes of MBA programmes has the effect of eliminating all other avenues of learning that may be important to an individual's practice. This approach also excludes practitioners who have not attended business school, which may introduce a number of influences such as affordability and hence socio-economic factors, geography/nationality and age. The research into strategy tools is insightful as it provides a lens into understanding the practical application of tools but its primary focus is not on answering the question of how the practitioner came by his or her knowledge. If, for example, a practitioner employs Porter's Five Forces model it would appear flawed to assume that the technique *was* learned in a business school even though it is a staple of business school strategic management teaching. It could have been learned through practice, from a colleague who had attended business school or any of a number of other ways. This concept, that business schools have potentially both a direct and indirect influence, is depicted in Figure 2.9.

Figure 2.9 – Business school influence, direct and indirect.



Business schools have more connections into practice than just directly through the provision of management education. Business school faculty, for example, often interact with practice as advisers or consultants (in which case it could be argued that they become practitioners) and some business associations and conferences contain a mix of both academics and practitioners. The concept of indirect influence is an important aspect that is introduced in Figure 2.9 and it relates to the previously discussed practice theory notion of practices being the 'shared possession of a collective' (Barnes, 2001, p. 25) as opposed to something that is the property of individuals. Barnes argues that no individualistic explanation can succeed in accounting adequately for a shared practice collectively executed.

While there remains little research focused on the direct impact of business schools on the practice of strategy practitioners (Jarzabkowski & Spee, 2009), the numbers attending business schools, as was discussed, are large and significant (Murray, 2010; Gayathridevi & Deepa, 2014). In tandem with this growth, however, has been a growing collective voice questioning the relevance of the MBA programme and business schools to practice. The often-quoted Leavitt (1989, p. 39) thought the MBA programme had a 'weird, almost unimaginable design' and its graduates came out as 'critters with lopsided brains, icy hearts, and shrunken souls'. This collective voice has continued to grow, with many prominent authors adding their concerns over the past three decades (e.g., Hayes & Abernathy, 1980; Leavitt, 1989; Hambrick, 1994; Pfeffer & Fong, 2002; Mintzberg, 2003; Pfeffer & Fong, 2004; Bennis & O'Toole, 2005; Ghoshal, 2005; Markides, 2007;

Rynes, 2007; Chia & Holt, 2008; Grant, 2008; Rubin & Dierdorff, 2009; Laud & Johnson, 2013; Rubin & Dierdorff, 2013).

The importance of management pedagogy, via business schools, to practice was discussed by Ghoshal (2005) in his seminal, posthumous, article on the state of management education. He employed the concept of a 'double hermeneutic', a concept expounded by British philosopher Anthony Giddens (1982), that states that there is a two way relationship between theory and practice in the social sciences. In the situation where a one way relationship exists, a single hermeneutic as is common in physical sciences, theory does not alter reality: whatever is theorised that the sun does, for example, has no impact on what the sun actually does. A double hermeneutic, however, as Ghoshal explained, is a situation where a theory has the ability to alter current practice and this is predominantly the case in the social sciences. The theoretical base on which management, including strategic management, is taught can impact on the practice of those exposed to the teaching despite a theory's strength or validity. Ghoshal, in the light of the accounting scandals, argued that bad management theory, promulgated through business schools, could actually destroy good management practice.

Whilst much of the relevance debate centres on the focus of business schools and management education in general, the strategic management field has been included specifically in the debate (see Bower, 2008; Grant, 2008; Jarzabkowski & Whittington, 2008a for a recent dialogue on this subject). Jarzabkowski and Whittington (2008a) noted the concern regarding the relevance of business schools to the value of strategy theory and research for strategic management practice. They suggested that the field was one that many authors considered 'to be stuck in an old paradigm that was irrelevant to a more competitive and dynamic environment' (p. 266). These questioning voices, and the extended debate did not, according to Mintzberg (2003), stop business schools embracing the rational planning methods and teaching them almost exclusively.

Business schools have been under attack in terms of the relevance of their curricula to the practice of management and in terms of their quality (see citations above). Pfeffer and Fong (2002) argue that the curricula taught in business schools bear only a small relationship to what is important for succeeding in business. It is also thought that the expansion in business education was achieved, at least in part, by 'sacrificing educational quality and academic standards to compete for enrolments and revenues' (Pfeffer & Fong, 2004, p. 1512). In addition, the preoccupation with scientific methods and rigour

in research and teaching at the expense of practical relevance (Bennis & O'Toole, 2005) is a familiar theme (Mintzberg, 2003; Ghoshal, 2005; Hambrick & Chen, 2008). Indeed, in an even more familiar theme Datar, Garvin, and Cullen (2011) argue that the MBA is at a crossroads. As Blass and Weight (2005) note, however, these criticisms are seldom based on research and evidence but use the current situation as the starting point to propose solutions. This has parallels with the related debate on the relevance/rigour of academic research to business practice where Kieser et al. (2015) similarly noted that much of the literature tended to be essayist or based on opinion statements.

In the face of this criticism business schools have not remained simply static and many have adopted new approaches to maintain their relevance (Datar et al., 2011). European business schools are reported to be moving away from the American model (re-empowering) with a more cross-cultural and societal focus based on an interdisciplinary approach (Kaplan, 2014). Paton et al. (2014) used practical reflexivity within a strategic partnership between academia and practice and demonstrated how this could add value and enhance learning for both spheres. The more recently introduced International Masters in Practicing Management (IMPM) has a focus of reality, not research, underpinning teaching (Blass & Weight, 2005). Business schools have also developed eMBAs, online delivered MBAs, though Blass and Weight (2005) note that, in general, these are seen by the business schools themselves as a second-best option. Finally, Datar et al. (2011) found that the most innovative courses in MBA programmes now employ experiential or active learning and are experimenting with the mix of faculty, alumni, practitioners and even students in these activities.

The criticism of business schools is not solely an academic argument. As business schools do not have a monopoly on the production of practitioner advice and information, they are also in competition with producers of what is termed 'popular management'. Popular management is often researched within academia under the labels 'management fads', 'management fashions' and 'business gurus' which Gibson and Tesone (2001, p. 122) more generally define as widely accepted, innovative interventions that are designed to improve some aspect of organisational performance. Although much of the material popularised can ultimately be traced to an academic source (Jackson, 2001), the information is dispensed in a more stylised and easy to consume form. Clark and Salaman (1998) argue the competition is to convince practitioners that they are at the forefront of management innovation and Abrahamson (1996) and Starkey and Madan (2001) do not see this competition as benign. Abrahamson (1996) issued a warning that if it is a

race for significance then there will be winners and losers and, if business schools are perceived as lagging behind rather than leading management thinking, they will be seen as peripheral.

The ability to connect with practitioners has changed dramatically in recent years. The term 'literature' is often tied closely to the concept of paper-based information sources but the rapid advance of the internet, and digital devices in general, has fundamentally changed the nature of how information is stored and accessed. The majority of magazines and books, both academic and popular, can be purchased, viewed or downloaded via the internet. This has significantly increased the reach of these publications in a cost effective manner, an aspect that has been able to be exploited by producers of popular management. The following table, Table 2.1, demonstrates this by contrasting *The Academy of Management Journal*, a leading scholarly journal, with *Fast Company*, a leading business magazine, with *Fast Company* circulating 40 times the number of print copies and attracting 190 times more online visitors.

Table 2.1 – The reach of scholarly journals and popular management magazines.

Area	Academy of Management Journal (2014)	Fast Company (2014)
Printed circulation	18,193	725,000
Online visitors	Page views per year: 783,499 Unique visits per year: 391,050	Page views per year: 381,000,000 Unique visits per year: 75,000,000

Given this competition, it is surprising that most research attention has been focused on the impact of scholarly journals (Podsakoff, MacKenzie, Podsakoff, & Bachrach, 2008) rather than the impact of popular management. The latter, in fact, received relatively little attention until the 1990s (Jackson, 2001). This is, however, understandable given that academics face the cliché – publish or perish – that is rooted deep in the reward systems of academic life (Baruch, 2001). A scholarly journal's output is typically a set of articles which report new theories or empirical findings. McWilliams, Siegel, and Van Fleet (2005) commented that most articles are not widely read, even by academics, and have little actual influence, and Gopinath and Hoffman (1995) found that CEOs did not regularly read publications containing strategic management research. As the main customers for these journals are other academics, this creates what Hambrick (1994) famously called in his 1993 presidential address 'an incestuous, closed loop' (p. 13). The

view that scholarly journals have limited relevance to practitioners is an area of interest and debate within the management and strategic management fields under the label the 'rigour-relevance' debate (see Kieser et al., 2015 for a recent and comprehensive review).

While much debate concerns the rigour-relevance issue, the area of popular management became an area for greater academic interest from the 1990s (Jackson, 2001). Mazza and Alvarez (2000) noted that popular management occupies the important ground between academia and end-users and not only recycles knowledge from academic sources, but produces information in its own right. These articles are written in easily accessible language, unlike many academic offerings, and what they may lack in academic status is made up for through endorsements by business celebrities (Mazza & Alvarez, 2000). This endorsement, and the use of many recognisable cases from high-profile organisations gives them a form of legitimacy (Guthey, Clark, & Jackson, 2009) and, as can be seen by the numbers in Table 2.1, significant reach and appeal.

The speed at which management fads can become popularised became an early area of interest in this field. Jackson (2001) cites several studies through the 1960s to the mid-1990s that demonstrate the rapid growth and turnover of management fashions. This growth, he notes, was 'supported and actively promoted by an extensive network of global and local consultants' (p. 15). This is, in some regards, not surprising given the likely financial drivers involved. Whilst scholarly publications seek to promote academic theories (and arguably the academics that are doing the theorising), popular management is in the more traditional business of making money and, like the majority of industries viewed as lucrative (Guthey et al., 2009), it is crowded and competitive. Huczynski (2006) reported that in 1987 Tom Peters was rumoured to be charging \$25,000 as a presenter, and Rosabeth Moss Kanter's hourly rate was \$17,000. It is not, therefore, surprising to hear the suggestion, attributed to Peter Drucker by Champy (2010), that the word 'guru' is used only because 'charlatan' is too long to put in a headline.

The literature on popular management is now significant and varied (for a comprehensive review of the literature Jackson (2001) provides a good overview and Guthey et al. (2009) provide coverage of the topic focused on the sub-theme of business celebrity). Jackson (2001) employs a two by two model that explains the study of popular

management as one of four approaches: The Rational Approach which suggests popular management exists because it works; the Structural Approach which explains the phenomenon through reference to economic, political and cultural contexts; the Institutional Approach which focuses on how fashions are diffused through the pressure of industry adoption; and, the Charismatic Approach which places the focus on the individual propounding the fashion (Jackson, 2001).

The Charismatic Approach was able to shed light on the phenomenon of business celebrities but little on how managers and executives employ the ideas from business celebrities in practice (Jackson, 2001). In a recent, interesting study that incorporated an upper echelon's perspective, Rossem and Veen (2011) looked at the familiarity of management concepts, noting that diffusion was not homogenous and that much of the diffusion could be explained by characteristics of managers such as age, gender and functional background. They acknowledged that the approach they employed, an internet survey tool, may have had some influence as it invited participant self-selection. In fact until recently, with the increased interest in areas such as sociomateriality and how strategy tools are used in practice, the only data Jackson (2001) was able to report that was available regarding management tools in use came from a survey conducted by Bain and Company (2015). This survey identified, among a range of other factors, the top ten most commonly used tools. Bain and Company (2015) still perform this survey and Table 2.2 documents the top ten most commonly used tools from 1993 through to 2014. Of interest, only mission and vision statements and benchmarking survive the 20 year period. Strategic planning also appears to be moving 'in the wrong direction'.

Table 2.2 – Top ten management tools over time.

	1993	1996	2000	2004	2010	2012	2014
1	Mission & Vision stmts	Strategic planning	Strategic planning	Strategic planning	Benchmarking	Strategic planning	CRM
2	Customer Satisfaction	Mission & Vision stmts	Mission & Vision stmts	CRM	Strategic planning	CRM	Benchmarking
3	TQM	Benchmarking	Benchmarking	Benchmarking	Mission & Vision stmts	Employee engagement surveys	Employee engagement surveys
4	Competitor profiling	Customer Satisfaction	Outsourcing	Outsourcing	CRM	Benchmarking	Strategic planning
5	Benchmarking	Core competencies	Customer Satisfaction	Customer segmentation	Outsourcing	Balanced scorecard	Outsourcing
6	Pay-for-performance	TQM	Growth strategies	Mission & Vision stmts	Balanced scorecard	Core competencies	Balanced scorecard
7	Reengineering	Reengineering	Strategic alliances	Core competencies	Change management	Outsourcing	Mission & Vision stmts
8	Strategic alliances	Pay-for-performance	Pay-for-performance	Strategic alliances	Core competencies	Change management	Supply chain management
9	Cycle time reduction	Strategic alliances	Customer segmentation	Growth strategies	Strategic alliances	Supply chain management	Change management
10	Self-directed teams	Growth strategies	Core competencies	BPR/TQM	Customer segmentation	Mission & Vision stmts	Customer segmentation

Source: Bain & Company (2015)

In keeping with the general trend of management research, management fashion theorists have focused primarily on the macro-level, the organisational or national level, and few studies have been carried out at the level of individual managers (Madsen & Stenheim, 2013) to date. The actual impact that popular management has on practice is an area that remains relatively unknown (Jackson, 2001). Clark (2004) notes that management fashion researchers claim that the main focus of their research is on the diffusion process and the degree to which ideas become institutionalised within organisations, yet, he notes, they rarely provide empirical evidence for this. Indeed Madsen and Stenheim (2013) observe that little research has looked at the role of managers in the adoption and implementation of popular management fads and fashions, a view reiterated by recent researchers in this area (Rossem & Veen, 2011; Veen, Bezemer, & Karsten, 2011).

Returning the focus to business schools, the very public failure of companies, such as Enron, with the fall from grace of their often highly qualified managers and executives, followed by the Global Financial Crisis (GFC), has intensified the focus and debate regarding business school pedagogy and relevance (Ghoshal, 2005; Currie et al., 2010). Stanford's 2004 MBA programme brochure with the tag line, 'Change Lives, Change Organizations, Change the World', was their attempt to alter their focus post the early 2000 accounting scandals (Pfeffer & Fong, 2004). This tagline can be read unfavourably, and is somewhat prophetic in the wake of the GFC which created a lot of change, the

vast majority of it unwanted by people, organisations, and the world. Currie et al. (2010) observed that many involved in the global disasters were MBA graduates. Enron, for example, had a recruitment focus on MBAs from top schools (Whittington et al., 2003) and this has caused many business schools, like the Harvard Business School, to reflect and consider options such as having MBAs sign something equivalent to the medical profession's Hippocratic Oath.

The introduction of a declaration similar to a Hippocratic Oath for MBA graduates, the majority of whom will be practising managers or aspire to be managers (or strategy practitioners), introduces the idea that management should be a profession like medicine and law. This is a theme that has been discussed and debated in both mainstream management (e.g., Khurana & Nohria, 2008) and through SAP articles (e.g., Whittington, 2007). The idea that management education is tightly related to managerial practice is based on the model of a profession where there exists a body of knowledge that is understood to be vital for effective practice (Willmott, 1994; Hay & Hodgkinson, 2008). The knowledge base of a profession is considered to have four essential properties: it is specialised, firmly bounded, scientific, and standardised (Schön, 1987) and members need to be indoctrinated into this knowledge base before they can practise. Accountants, lawyers, medical practitioners and engineers, all members of professions, are not allowed to practise without the required credentials and it is an understatement to say that learning these professions on-the-job would be frowned upon. Business schools, it should be noted, are not neutral in this debate and would, in all probability, gain significantly if all managers, executives, CEO's, directors and strategy practitioners needed a credential (like an MBA) before being permitted to practise. In an era where business school education and revenues are under pressure (Datar et al., 2011), this would be a significant boost.

The call, however, for management to be a profession is not new. Barker (2010) reflects that the first issue of the Harvard Business Review, published in 1922, contained an article from a Harvard professor which claimed that business may be thought of as a profession, and that effort was required to consider what the best professional training for future executives should be. Indeed, the idea that business *was* a profession was often a base assumption with authors, such as Simon (1967), stating without qualification that the task of a business school was to train men for the practice of management as a profession. The history of business schools tends to indicate that the original conception was the establishment of a profession and professional school that

would be the exclusive source of management training (Khurana & Nohria, 2008). Kieser et al. (2015) argue that the Porter–McKibbin report was influential in focusing business schools, as institutions, on the need to be more relevant to practice by adopting a professional model similar to medical schools. Evidence Based Management (EBM), which is discussed shortly, is a more recent topic of debate within the management community (Rousseau & McCarthy, 2007; Charlier et al., 2011; Rousseau, 2012a) though its arguments can be traced back to early business school history.

The call to treat management as a profession is aligned to the call for a move towards EBM. EBM is aligned to a technical rational view of the world where activity is based on instrumental problem solving through employing the scientific method (Schön, 1995) and Schön (1995) notes that a technical rational view is basically a positivist view of the world. Tourish (2013) observes that strong parallels with the field of medicine are often used in the argument that management decisions require a more 'science-informed practice of management' (Rousseau, 2012b, p. xxiii). Rousseau and McCarthy (2007, p. 85) identify that the goal of 'evidence-based teaching is the learners' acquisition, memory, and retrieval of principles of cause–effect relationships, enabling their professional practice to reliably yield desired results'. This is sometimes referred to as 'grand theory', the idea that social research will be able to uncover pre-existing and universal explanations of social behaviour (Suddaby, 2006).

The primary motive for EBM is focused on improving what is perceived to be the current poor state of management.

Since many of them [managers] have not learned how to critically evaluate the quality of evidence, too much attention is paid to unfounded beliefs, fads, and fashions, and the success stories of famous CEOs. As a result, billions of dollars are spent on ineffective management practices, to the detriment of employees, their families, and society at large. (Barends, 2015, p. 205).

While EBM is focused on making decisions through the use of evidence from multiple sources there is, according to Barends (2015), a misconception that evidence-based practice places too great an emphasis on evidence originating from scientific research. EBM advocates argue that an EBM approach does not seek to guarantee outcomes nor that managers simply comply mindlessly with what the evidence decides (Rousseau, 2012a) but, rather, that the evidence forms the basis of activity and action. The recent publication of a handbook (Rousseau, 2012b) of articles, in conjunction with Barend's

(2015) thesis which pulled together a range of published EBM arguments suggests that the professional call may be gaining momentum, although the fact remains that, after half a century of looking, there are few, if any, generally accepted 'rules' for management (Grey, 2004).

Turning briefly to strategic management in regard to EBM, Grant (2008) notes that strategic decisions, in particular those that are 'wicked' (Mason & Mitroff, 1973) in nature, involve approaches that require a range of skills and 'are not amenable to solution by algorithm, no matter how complex or sophisticated' (p. 278). There are a number of scholars (e.g., Starbuck & Milliken, 1988; Mintzberg, 1994, 2003; Tengblad, 2012) who share this opinion that strategy cannot be treated as a problem in deduction (Rumelt, 2011), based solely on quantitative data (Bennis & O'Toole, 2005). In other words they argue there is no determinable cause-and-effect relationship.

The alternative view of the profession argument, that management is not a profession, can be found in a range of management studies (e.g., Willmott, 1994; Knights & Willmott, 1997; Hay & Hodgkinson, 2008). In brief, these studies argue that the criticism of business school relevance, the call for management to be a profession and the associated use of EBM all rest, according to Hay and Hodgkinson (2008), on the managerialist assumption that management education is functionally related to the development of managerial effectiveness. In their view, this is a large oversimplification as managing is complex and involves social, political, moral and emotional dimensions. As such, there is no professional body of knowledge that can be easily identified, let alone transferred (Hay & Hodgkinson, 2008). Engwall (2007) states that due to the widespread adoption of varying management concepts, management education simply cannot be characterised as a professional education. He further refers to the work of British sociologist Richard Whitley (2000) who was able to identify seven types of academic discipline placing management at the polar opposite end to physics. Whitley (2000) described management as a fragmented adhocracy with low dependence and high task uncertainty.

The view that the goal of the management field to attain the status of a profession is inherently flawed is supported by a number of scholars (Mintzberg, 2003; Ghoshal, 2005; Grant, 2008; Barker, 2010). Schön (1995) questions whether it is even possible for professional education to yield a curriculum adequate for the 'complex, unstable, uncertain, and conflictual worlds of practice' (p. 12). In regards to the criticism over

relevance, Paton et al. (2014) challenge the notion of relevance which they note is seldom explicated, and Augier and March (2007) note that the definition of relevance is ambiguous, its meaning is complex and it is difficult to measure.

In summary, despite the size of what may be termed the 'business school industry', there have been few studies on how business schools impact on the practice of management (Pfeffer & Fong, 2002; Jarzabkowski & Spee, 2009). Studies are beginning to emerge (Hay & Hodgkinson, 2008; Rubin & Dierdorff, 2013) and the interest in the sociomateriality and how tools, especially strategy tools (Wright et al., 2013; Jarzabkowski & Kaplan, 2014) are used in practice is beginning to fill some of the identified gaps. However, there remains little research that focuses on how practitioners develop their practices and the roll of business schools in this process (Jarzabkowski & Spee, 2009).

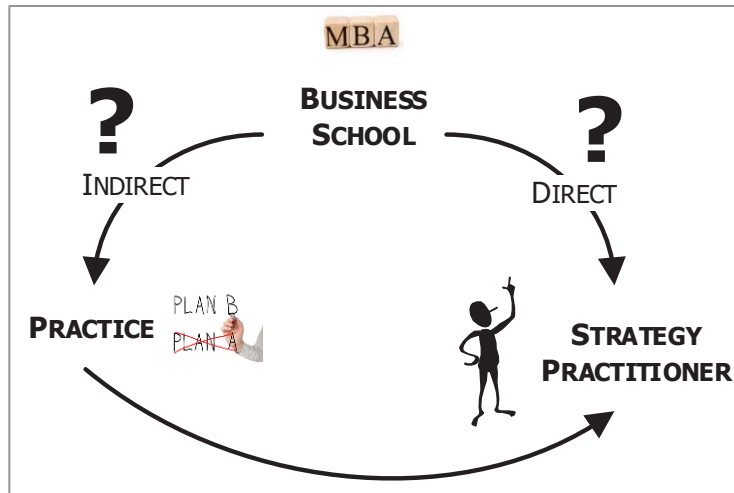
Popular management has become a significant aspect of the modern business environment and research into fashions, fads and gurus (business celebrity) has become increasingly prevalent since the early 1990s (Jackson, 2001). Again, although the research has provided insight into many aspects of these phenomena, the research has been primarily at a macro-level (Madsen & Stenheim, 2013) and the impact on practice is an area that remains relatively unknown (Jackson, 2001; Madsen & Stenheim, 2013).

In the wake of the accounting scandals and GFC there has been an increased debate over whether management should become a profession. On one side a number of authors (Pfeffer & Sutton, 2006; Khurana & Nohria, 2008) argue that this would be positive for the field and return management to a position of legitimacy (Khurana & Nohria, 2008). Alongside this is the related call for a move to embrace EBM, a technical rational view of the world arguing that managers should make decisions by employing an evidence based approach. Countering this argument are scholars who argue that management (Whitley, 2000; Engwall, 2007), and strategic management (Starbuck & Milliken, 1988; Mintzberg, 1994, 2003; Tengblad, 2012), are not professions. Furthermore, they state that management is complex and that it involves social, political, moral and emotional dimensions. As a result, there is no professional body of knowledge that can be easily identified, let alone transferred (Hay & Hodgkinson, 2008).

It is considered that, given the size and reach of business schools and popular management, they should impact significantly on the practice of management yet there

is little empirical evidence as to the nature of this relationship. Figure 2.10, which was previously introduced, is left with question marks.

Figure 2.10 – Business school influence?



2.3 SUMMARY

The purpose of this section is to summarise the key aspects revealed during the examination of the literature in relation to this research to understand in greater depth how strategy practitioners develop their practices. The literature review firstly sought to understand what is meant by the term strategy before, secondly, examining the literature related to strategy practitioners and their practice development.

It was identified that within the mainstream academic strategic management community there is no agreed definition of strategy or strategic management and within the SAP perspective, whilst there is agreement that the field of practices is the basis for research, the definition employed is very broad. In addition, while there have been a number of attempts to determine what strategy means within an academic context (e.g., Nag et al., 2007), little is known about what the term strategy means to strategy practitioners (Paroutis & Heracleous, 2013). Of significant interest, it was generally agreed in the literature that a dominant strategy paradigm (Clegg et al., 2011), based on rational, economics-based thinking existed, and that this paradigm has likely had a significant influence on practice and on teaching strategic management for decades. The implication from this is that strategy practitioners, and their views on strategic management, may have been influenced by this paradigm.

The lack of focus on individual strategy practitioners within mainstream strategic management research inspired an increased interest in strategy practitioners and their

practices. SAP, influenced by both the practice turn in social sciences as well as strategy process research, has a stated aim to understand what strategy practitioners do in practice and how they develop their practices. A broad range of methodological approaches has been employed in SAP research and this has allowed strategy to be viewed through a number of lenses, adding to the richness of strategic management research. However, there is yet to be significant focus on how strategy practitioners develop their practices within SAP research and the literature leaves the impression that strategy practitioners are, in the main, viewed as ahistorical.

Another relatively under-researched area concerns the impact of business schools on practitioner development. While it is recognised in the literature that business schools are a large and significant aspect of the business training and development environment through undergraduate, postgraduate and executive education, there are few empirical studies on the direct impact of business schools on the practice of strategy practitioners (Jarzabkowski & Spee, 2009). Popular management, an area in competition with business schools, equally does not often provide empirical evidence that assesses its impact on practitioners (Clark, 2004). In addition, theorists in the popular management field have focused primarily on the macro-level, the organisational or national level, and few studies have been carried out at the level of individual managers (Madsen & Stenheim, 2013). Therefore, while it is considered likely that business schools and popular management impact on the development of practitioners, this currently seems to be left as an assumption.

Finally, an area that emerged within the literature on business schools was the question of whether management, including strategic management should be a profession. There appear to be two distinct schools of thought in this regard with authors (e.g., Khurana & Nohria, 2008; Rousseau, 2012a) on one side arguing this would be a positive move to improve management's effectiveness and legitimacy and, on the other side, authors (e.g., Schön, 1995; Barker, 2010) who argue that management is complex involving social, political, moral and emotional dimensions and, as such, there is no professional body of knowledge that can be easily identified, let alone transferred (Hay & Hodgkinson, 2008). Whilst this debate does not concern the development of current strategy practitioners, it adds an interesting dimension to the development of strategy practitioners in the future.

CHAPTER 3 - RESEARCH DESIGN

'How are you getting on?' said the Cat.
'I don't think they play at all fairly,' Alice said, in a rather complaining tone; 'and they all quarrel so dreadfully one can't hear oneself speak'

Lewis Carroll

This chapter serves as the link between the discussion of the current state of knowledge and the production of data for new knowledge. The aim of the chapter is to discuss how the research question was developed; the methodological foundation on which the research was conducted; and, how the method to examine the research question was selected.

Firstly, Section 3.1 documents the development of the research question and how it has been informed from existing debate and theory which was discussed in the literature review chapter. Section 3.2 is focused on the methodological foundation under which the research was conducted and includes a section that locates the researcher's personal worldview within the interpretivist-constructivist⁶ paradigm. The purpose of Section 3.2 is to establish the alignment between the researcher and the methodological foundation for the research as this is a significant factor in the selection of the research method pursued in this thesis. Section 3.3 discusses the process used to select narratives of practices from within the broader narrative-biographical perspective to gather data drawn from the careers of practicing strategists. Section 3.4 defines the SAP perspective and identifies why this is an appropriate perspective to employ to study the research question. The chapter finishes with a summary of the steps and logic employed in the research design.

3.1 DEVELOPING THE RESEARCH QUESTION

'We need to take strategy seriously because it has important effects on the world.'

Whittington et al. (2003, p. 397)

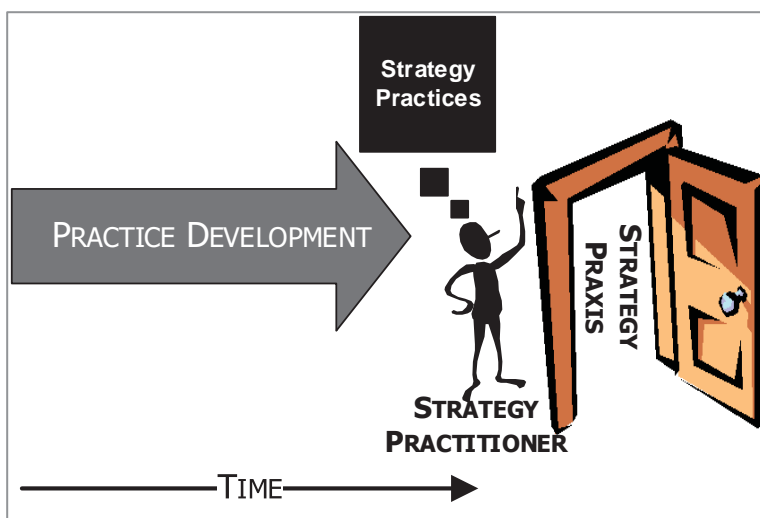
⁶ The terms constructivist and constructivism will be used in this thesis to refer to the interpretivist-constructivist paradigm

This section is focused on refining the research question(s) forming the foundation of this study. The literature review chapter demonstrated that there is a rich body of knowledge on strategy and strategic management, but that there is a lack of focus on strategy practitioners, who largely remain an under-researched phenomenon. Mainstream research into strategy cognition and TMTs has humanised the research agenda but tended to view strategy practitioners as a collective or a set of demographic variables. SAP research has focused on strategy practitioners but, to date, has not focused significantly on how they develop their practices. From a supply-side view, there were few studies that looked at the impact of business schools and popular management on practitioner development. As a result, strategy practitioners appear to be ahistorical.

Therefore, the primary research question, which is depicted pictorially in Figure 3.1, is:

How do strategy practitioners develop their practices; the skills, abilities and knowledge they use during episodes of strategy praxis?

Figure 3.1 – The research question figuratively.



Continuing on from the literature review, a secondary research question has been identified as follows:

What impact do business schools and popular management have on the development of strategy practitioners?

What experiences, education and information have been formative in the development of the practices employed? Do business schools provide the foundation of strategy

practices that are then modified over time during episodes of strategy praxis? Do management fads and fashions play a part in practice development? What other experiences yet to be considered are formative in the development of practices?

According to Booth, Colomb, and Williams (2008), answering the question 'so what' vexes most researchers. It is, therefore, important to state why this research question is an important one for the strategic management field. The literature has shown that a strategy practitioner's knowledge structure has a significant influence on the framing of decisions in strategic decision making (Narayanan et al., 2011) and his or her knowledge structure is formed from experience (Walsh, 1995). Therefore, how strategy practitioners develop their practices has a significant impact on strategy formulation. Strategy formulation (i.e., deliberate strategy), which is generally accepted alongside emergent strategy as a key part of most organisational strategic management, has a direct impact on the organisation's future activities and direction and ultimately organisational performance. To adapt a claim from TMT research, strategy practitioners and how they practise strategic management appears to matter. But where they come from no one really knows.

From the SAP perspective, strategy practitioners and how they develop has been a stated area of interest, as covered in the literature review chapter. The integrated framework introduced by Whittington (2006) demonstrated the interrelated nature of practitioners, practices and praxis. Therefore, how a strategy practitioner develops his or her practices must impact on his or her strategy praxis. As the SAP perspective has noted, strategy is 'conducted by living beings whose emotions, motivations and actions shape strategy' (Jarzabkowski & Spee, 2009, p. 70). Importantly, emotions, motivations and actions are based on how strategy practitioners see and interpret the world, which is based on their own individual experience and the collective experiences they encounter at the time. Strategy practitioners are not ahistorical and their development shapes their practice.

This study will contribute to the strategic management academic field by providing an empirical study into the development of strategy practitioners. In addition, it will provide an empirical study on the impact of business schools and popular management on the development of strategy practitioners. There are currently gaps in both of these areas. Dependent on the research findings, it is considered that the research has potential to contribute to, or inform, other debates such as the professional status of strategic

management or the practitioner view of strategic management, what can now be termed the informed view of strategic management.

It is difficult to identify the immediate benefits for practitioners from this research as practitioners do not read scholarly journal articles let alone PhD theses. Ultimately this research is a contribution along a path to understanding more about the research focus raised by Whittington (2006, p. 626), 'given the investments involved, how strategy practitioners are best produced is an urgent research question'. It must be noted that this latter question is an ambitious research agenda. This research will contribute by providing a study that identifies how a sample of strategy practitioners have been produced, but in order to determine how to 'best' produce strategy practitioners it must first be determined what is 'best'. The literature review revealed that the strategic management academic community has yet to reach this point.

The focus of this thesis now turns to developing an approach to answering the research question. The literature has made it clear that in order to answer the research question it will be necessary to develop 'close with' (Johnson, Balogun, & Beech, 2010b) relationships as the answers are located within the knowledge structure (i.e., heads) of strategy practitioners. It is only strategy practitioners who are in a position to be able to reflect and relate what events and experiences were significant in their practice development. Simple demographic variables such as age, education, degrees achieved or years of experience are not expected to be sufficient to answer the research question. Therefore, the method employed must, in SAP tradition, get close to strategy practitioners and allow them to reflect and narrate their stories.

3.2 METHODOLOGICAL FOUNDATION

The purpose of this section is to identify and discuss the methodological foundation which underpins this research. Methodology is defined as the theoretical and philosophical basis upon which the research is based (Saunders, Lewis, & Thornhill, 2009). With regard to research methodology, Saunders, Lewis, and Thornhill (2009) observe that the main influence on a researcher is likely to be his or her view of the relationship between knowledge and the process by which it is developed. Therefore, this section starts by introducing the researcher's own worldview which, it will be shown, positions the researcher within the broad constructivist paradigm. In Section 3.2.2 the philosophical foundations of this paradigm are discussed in greater depth to demonstrate that there is alignment between this paradigm and the researcher's worldview. Please

note, however, that a complete review of the constructivist paradigm is well beyond the scope of this thesis, and that the historical roots of the paradigm are discussed in detail in the majority of social theory text books (e.g., Ransome, 2010; Mann, 2011; Salerno, 2013). This section concludes by discussing the SAP perspective and the 'practice turn' to demonstrate why this is an appropriate perspective to employ to answer the research question.

3.2.1 INTRODUCING THE RESEARCHER

This thesis is written in the third person as this is a common method for the presentation of a PhD thesis. However, as the discussion, justification and explanation of research design, methodology and method unfold, it is important for the reader that the background and worldview of the researcher are explicitly stated as they impacted on the way in which the research was designed and conducted and clearly they significantly impacted on the selection of the research question. For example, the ability to create 'close with' (Johnson et al., 2010b) relationships with participants was due in part to the researcher's practitioner/consultancy background. As the researcher and participant each had a practice-based understanding of strategic management, participants were expected to be more likely to become engaged in the interview process (Rubin & Rubin, 2012). This allowed the development of relationships that may, in other circumstances, have taken more than one interview. Therefore the purpose of this brief section is to introduce 'myself', in the first person, to provide pertinent background information and outline 'my' own worldview.

First I will provide aspects of my background that are relevant to this research. My initial introduction to strategic management occurred in 1999 when I attended a course on the subject at Macquarie University in Sydney, Australia. The course was led by a business consultant-come-academic (that could be the other way around) and it is he who I have to thank for igniting my interest in 'strategy'. On reflection, the course content was primarily focused on a traditional, rational and economic-based view of strategic management with Porter featuring significantly. Importantly, and in line with a traditional view, the course provided me with a sense of the value strategic management had in determining firm performance. I subsequently completed an MBA which reinforced a view that strategic management was a valuable organisational process, *if* performed well. The traditional view of strategic management which I had been exposed to naturally shaped my view that strategic management was a rational and linear endeavour aimed

at establishing a vision of the future and the path to get there. Therefore, my practice became primarily focused on strategy formulation.

This view of strategic management, that has been discussed in the literature review as the dominant strategic management paradigm (Clegg et al., 2011), with its traditional, rational practice did not, however, fit me personally, due to its impersonal nature, or professionally, as outcomes often fell short of what the strategy suggested was attainable. One formative illustration involved the development of a strategy to amalgamate a group of small health-care providers into a larger, corporate structure. The strategy itself, in my opinion, was economically sound but what was not factored in sufficient detail were the aspects of people and organisational culture, resulting in the outcomes falling well short of what was anticipated at the time of planning.

It was through working with a wide range of strategy practitioners during episodes of strategy praxis that I was left pondering the question of what it takes to be an *effective* strategist. Where do the required skills, knowledge and abilities come from that allow for effective strategy praxis and, of real interest, how do you go about acquiring them? I had obtained an MBA, which as I understood it at the time, was somewhat the pinnacle of strategic management! It was during this time that, in order to answer that question, I needed to know more about strategic management.

I had what I considered a relatively solid practitioner background but I was new to academic research and, therefore, time was spent reading literature relating to strategic management and research in general. Through this process I gained an appreciation of the different paradigms and methodologies available and it was the constructivist approach that had both a natural fit and initially appeared suited to the broad research area in which I was interested. More latterly in my PhD journey, it was the Chicago School tradition in particular towards which I felt drawn. I found its focus on individuals and how they interact to create subjective meaning to be very valuable and insightful.

The literature in the broad constructivist area, and the associated research methods texts and articles, identified the importance of researcher reflexivity, the ability to understand how a researcher's experiences and worldview can affect the research process (Morrow, 2005). Rennie's (2004) succinct definition of reflexivity encapsulated this concept, 'self-awareness and agency within that self-awareness' (p. 182). My own worldview is captured within an example employed by Gill and Johnson (2010):

The behaviour of a pool or snooker ball might be adequately understood in terms of necessary responses caused by particular sets of stimuli in certain conditions: the amount of force delivered to the cue ball propelling it in a particular direction; the angle at which the cue ball strikes the object ball and the amount of momentum delivers... At no point do we have to refer to the subjective apprehension of the balls to explain their behaviour. However to describe and explain the behaviour of the players in terms of stimulus response would be bizarre. Their behaviour can only be adequately explained through reference to a range of subjective criteria. (p. 59)

I view people, strategy practitioners in the case of this research, in the same light as the snooker or pool players, not the balls. To this end I do not believe that adequate insight into their practice development can be gained through objectively measurable variables. While, as has been discussed in the literature review, the extensive use of variables of this nature has allowed many interesting and useful insights to be developed, many researchers using them recognise that the chief drawback is the 'black box' problem (Markóczy, 1997, p. 1228). Because it is difficult to measure knowledge and beliefs, proxy variables are employed (Markóczy, 1997) If, however, a relationship is observed between a proxy variable, for example a credential such as an MBA, and a positive or negative organisational outcome, it is still necessary to ascertain the nature of this relationship, and why it exists (Finkelstein et al., 2009). Namely, it is essential in both research and critically reflective practice to get beyond relationships to causality.

This worldview allows me to position myself in the broad constructivist paradigm. In keeping with this paradigm, Morrow (2005) suggests that it is important to openly reflect on one's own experience and assumptions and clearly state these so readers will understand not only the research conducted, but the inherent philosophical assumptions that underpin the research. Borrowing the term 'horizons of understanding' (Rennie (1994) in Morrow, 2005, p. 250) I briefly outline my own background and high-level assumptions.

As an established and practising management consultant entering the research community for the first time, my background and experiences are predominantly from the practitioner perspective. The various management positions I have held, along with my extensive work as a consultant, has allowed me to work with a range of organisations at the management coal

face and this experience gives my research and academic aspirations a practitioner focus. I believe that research is needed to enhance practice and, therefore, the underlying question is the one Whittington (1996) asserts as key for the SAP field – 'what does it take to be an effective strategy practitioner' (p. 731). This dovetails into my overall, long-term goal of contributing to the improvement of strategic management practice.

I position myself at this point in time within a constructivist paradigm. For this paradigm how people view and interpret an object or event and, most significantly, the meaning that they attribute to it that is of most importance (Rubin & Rubin, 2012). It is through understanding how participants in the research view and make sense of their world and their experiences (Riessman, 2001) that I believe I will be able to gain insight into what significantly contributed to their practice development as strategy practitioners.

The process of gaining an understanding of the differing philosophical paradigms was enlightening and during this process I also developed a respect for, and interest in, the goals and aspirations of critical theory which seeks to reassess the understanding of society (Kincheloe & McLaren, 2002). As I noted in my background, it is the improvement of strategic management practice that is my ultimate goal, not simply a greater understanding. Critical theorists' aspirations are, however, recognised to be predominantly focused more strongly at a macro-level and they seek understanding *and* change in the nature of society itself (Cohen, Manion, & Morrison, 2007) as opposed to improvement within the existing societal norms. As such it is considered that the improvement of strategic management practice, in the terms being suggested, could be regarded by critical theorists as merely improving, or potentially reinforcing, the *status quo*. In this regard it was not thought that a critical theory approach was aligned with the research question or the researcher, at least currently.

Later in the research process I was helpfully reacquainted with the broader philosophy of knowledge. The works, for example, of Oldroyd (1986) and Kuhn (2012) provided a compelling foundation from which a greater understanding of the historical and contemporary views on knowledge and how it is created could be developed. The diversity of views made me acutely aware of establishing my own foundation on which to base both the current study as well as future research endeavours. The extensive

rigour-relevance debate within the academic management community signalled that it would be challenging for me to contribute to the research environment whilst remaining firmly engaged in practice, effectively spanning the academic-practice divide (Lockhart & Stablein, 2002).

As I was new to academic research, and qualitative research in particular, I took the suggestion of Stake (2010) to become more familiar with qualitative research. In line with his suggestions, I started keeping a journal to record my research journey, and this became a valuable tool especially when the data collection process commenced. I read parts of Studs Turkel's (1974) large, and interestingly titled book, - *Working: people talk about what they do all day and how they feel about what they do*. I read a wide range of journal articles focused on qualitative research (e.g., Morse et al., 2002; Morse & Mitcham, 2002; Morrow, 2005), and texts that discussed qualitative research methods (e.g., Robson, 2002; Saunders et al., 2009; Stake, 2010; Rubin & Rubin, 2012). Stake (2010) further suggested watching the movie *Kitchen Stories* (2003) which followed the progress of an observational researcher. His task was to observe and plot the physical path his subject took in his kitchen as he perched silently on a stool that resembled a tennis umpire's chair enabling him to observe from on high. Dry, funny and entertaining, it should be recommended to *all* new researchers. All these initiatives provided assistance, in their own way, to illuminate qualitative research although, on reflection, nothing is more powerful than becoming involved.

3.2.2 PHILOSOPHICAL FOUNDATIONS

Having established the background and position of the researcher, it is necessary to understand the constructivist paradigm in greater depth, as well as the philosophical foundations on which it is based, as these factors have a significant impact on the research design. The paradigm is broad and covers a range of philosophical traditions mainly associated with Max Weber (Ransome, 2010). Creswell (2014) notes the paradigm is referred to as constructivism or social constructivism and these terms are often combined with interpretivism. This section, therefore, looks at aspects of the historical development of the broad constructivist paradigm before detailing the philosophical foundations upon which it rests. The purpose of this section is to demonstrate that there is alignment between the researcher's worldview and the philosophical foundation of the research.

Authors (e.g., Mackenzie & Knipe, 2006; Creswell, 2014) commonly identify four broad philosophical paradigms which Guba and Lincoln (1994) term as a basic set of beliefs that define the worldview of an individual and guide action. The four paradigms are: postpositivism which is associated primarily with the scientific method; constructivism, which is focused on individuals and their subjective meaning; critical theory, the purpose of which is not merely to understand social phenomena but to change society for the better (Cohen et al., 2007); and pragmatism, with a concern for what works and solutions to problems. Guba and Lincoln (1994) did not identify pragmatism but included positivism although they noted that a pure positivist position is unlikely to be held by anyone acquainted with the philosophical debates. This section focuses solely on the constructivist paradigm.

Whilst it is acknowledged that tracing the roots of most philosophical paradigms and traditions can be taken back to ancient Greece, this discussion is a more limited overview. The starting point is in the 1920s at the Chicago School of Sociology where the social theory of symbolic interactionism (sometimes social interactionism or just interactionism) developed (Mann, 2011). Mann maintains that the roots of symbolic interactionism can be traced back to the philosophers Max Weber and Georg Simmel, urban sociologists (many also from the Chicago School), and their studies of inner city life and American pragmatists. Salerno (2013) argues that its roots stretch back further to European thought and the, 'idealist and Romantic German philosophies of the eighteenth and nineteenth centuries' (p. 43). The pragmatist philosophy retains a strong influence within this broad paradigm, especially in the United States of America (Salerno, 2013), and on qualitative research as evidenced by Strauss and Corbin (2008) who confirm that their methodology has a strong connection to interactionism and the philosophy of pragmatism. Charmez (in Denzin & Lincoln, 2008) observed that the views of the Chicago School and pragmatism fostered an openness and curiosity about the world and how it works.

Symbolic interactionism maintains that all action occurs between actors in social settings and is, therefore, interested in the day-to-day encounters which occur in society (Ransome, 2010). From these encounters individuals create subjective meaning which, in turn, develops and changes with more encounters or experiences (Denzin & Lincoln, 2008). Importantly, interactionists consider that in order to understand social action there is a need to understand people's 'consciously expressed desires, values and expectations' (Ransome, 2010, p. 166). This view was a move towards a more micro-

level analysis and a reaction against general systems approaches which sought to establish a general, and universal, philosophy of society favoured by contemporary philosophers such as Talcott Parsons (Ransome, 2010). The SAP perspective, as has been discussed, has a strong connection to this move towards a more micro-level analysis.

The Chicago School produced many notable scholars who advanced the interactionist tradition. Important early figures such as Charles Cooley and George Mead not only contributed significantly to the interactionist tradition (Mann, 2011), but were also influential through teaching and inspiring the next generation. Two notable student examples were Herbert Blumer, who is credited with coining the name symbolic interactionism, and Erving Goffman, who extended the thinking using the novel dramaturgical perspective, who were both major forces in advancing (Mann, 2011) and broadening interactionist thinking.

An area of significance in the constructivist paradigm is that of phenomenology which emerged from European philosophical circles (see Salerno, 2013 for a historical overview). Cohen *et al.* (2007) identify the major two philosophers often identified with phenomenology as Edmund Husserl (1859-1938) and Alfred Schutz (1859-1959). Cohen *et al.* (2007) observed that Husserl's focus was on questioning the 'common-sense, 'taken-for-granted' assumptions of everyday life' (p. 18) while Schutz looked to relate Husserl's theories to understanding the meaning structure of the world of everyday life. Like the majority of traditions in social theory, if not all of them, there is a range of perspectives under the heading phenomenology and these differ on particular issues. Cohen *et al.* (2007) argue that the following three points, first identified by Curtis and Mays (1978), can be taken as distinguishing features of the phenomenological viewpoint:

- A belief in the importance, and in a sense the primacy, of subjective consciousness.
- An understanding of consciousness as active, as meaning bestowing.
- A claim that there are certain essential structures to consciousness of which direct knowledge is gained by a certain kind of reflection.

Guba and Lincoln (1994) provide a solid overview of the constructivist paradigm in terms of ontology, epistemology and methodology. Ontologically, they associate the perspective with a relativist view where realities are multiple and intangible mental constructions dependent for their form and content on the individuals and groups holding

the constructions. From an epistemological point of view, they note the dominant view is subjectivist where the researcher and participant co-create the findings as the research proceeds. Methodologically, they identify that individual constructions can be elicited only through interaction between and among researchers and participants.

These aspects are closely affiliated to the previously discussed worldview of the researcher and demonstrate why it was logically and conceptually aligned and selected as the perspective under which to conduct this research. Having established the broad philosophical foundation that underpins this research, the focus now moves into the specific perspective that is being employed to examine the area of interest, the SAP perspective.

3.2.3 THE STRATEGY AS PRACTICE PERSPECTIVE

This section examines the SAP perspective, as established, in order to explain the selection of this perspective within which to conduct the research. It demonstrates that there is coherence between this perspective, the philosophical foundation of the research and the research question. To achieve this, the discussion will build on the literature review examining the origins of SAP and in particular its relationship with practice.

The practice turn has been previously discussed in the literature review as it provides the rationale for the emergence of the SAP perspective within the strategic management field. It is timely to recall that practice theorists share the desire to overcome social theory's dualism (Whittington, 2006) between what Schatzki (2005) label 'individualists', those who employ a micro-focus and attribute social phenomena to individual human actors, and 'societists' with their macro-focus who believe it is the macro social forces and institutions that are the prime factors. The previous section discussed the individualist view which is often viewed at the heart of a constructivist approach (e.g., Chia & MacKay, 2007). Societists, on the other hand, see individual behaviour and activity as a product of society's structures and, therefore, see social theory in more macro, structural terms (Salerno, 2013).

In this regard practice theorists do not locate themselves in either the individualist or societist camps, but rather position themselves between what they see as the two opposing positions. They argue that the appropriate place to locate research (Chia & MacKay, 2007) and develop an understanding of social phenomena (Schatzki, 2001) is within the field of practices. Simpson (2009) puts forward an argument that the practice view has the potential to be a Kuhnian paradigm shift which will demand a deep probing

of the philosophical assumptions that shape current academic discourse. She adds that practice theory has influenced a range of organisational research perspectives, adding new dimensions, including to the SAP perspective.

It would appear, therefore, that a practice theory approach, in its tight theoretical form, is at odds with the general constructivist paradigm. The SAP perspective, however, identifies its intellectual roots both with practice theory in general and from specific streams of thought within the strategic management community (Golsorkhi et al., 2010a). While SAP has, from a methodological view, tried to distance itself from an individualist perspective with its primacy on explaining behaviour as the result of actions of individuals (methodological individualism) (Vaara & Whittington, 2012), authors (e.g., Chia & MacKay, 2007) have argued that much of the SAP research remains firmly focused on such a view. This may be due, in part, to SAP's close historical relationship with the strategy process tradition (Golsorkhi et al., 2010a) as previously discussed. In practice, the SAP perspective is currently a 'broad church' and encompasses a wide range of different perspectives and there have been an equally wide variety of methodological approaches employed, for example (as noted in the literature review), activity theory, critical discourse theory, Foucauldian discourse analysis and Giddens' structuration theory.

Due to the differences between a practice theory view of research and the current SAP perspective that encompasses a wide variety of approaches, the SAP perspective would appear to be at a crossroads (Rouleau, 2013). Authors question whether SAP should break with its strategy process origins and develop a closer methodological relationship with practice theory (Chia & MacKay, 2007) focusing more specifically on ethnographic methods (Rasche & Chia, 2009), while others consider the possibility of developing a shared research agenda with the strategy process stream (Vaara & Whittington, 2012). While this debate is yet to be resolved, the current SAP perspective with its plurality of approaches provides a suitable platform, methodologically speaking, from which to conduct this research.

Orlikowski (2010) also makes a contribution to the argument of conducting practice focused research within the SAP perspective. She argues that there are three modes of engaging with practice: as a phenomenon with a focus on understanding what happens in practice; as a perspective which articulates a practice centred theory; and as a philosophy which commits to an ontology that places practice as constitutive of all social

reality. She argues that these modes entail different assumptions about how practice creates the world, and researchers engaged in studying practice as a phenomenon, as is the case for this research, can do so without the need to employ a practice theory or practice ontology. In addition, it is the SAP perspective's stated ambition to get closer to the world of the practitioner and understand how practitioners develop their practices (Whittington, 1996; Johnson et al., 2003; Jarzabkowski & Spee, 2009) which adds a compelling argument for using a SAP lens.

It is, however, recognised that the focus of this research is not specifically on strategic management when it is being practised as a phenomenon. Rather it seeks to understand how strategy practitioners develop their practices to the point of entering into an episode of strategy praxis. As such, it is argued that it is an important contributor to a SAP view of strategy practitioners. This aspect introduces an interesting question from a methodological perspective – how should an individual's history be treated when studying his or her actions in practice? If Barnes's (2001) analogy of riding in formation is recalled, a different perception of this practice will be gained depending on whether it is a skilled group of riders, a novice group, or a group of riders of mixed skills that is being observed. The same logic, it would appear, can equally apply to the practice of strategic management. This is, however, a question that sits outside the scope of this research, as precisely it is the participant's history that is of interest.

Within the strategic management field there was one other perspective under which this research could have been conducted, namely strategy process research. The discussion in the literature review highlighted that the process tradition helped to humanise the strategy field but the active role of the individual in strategy formulation remained understated (Chia & MacKay, 2007). The TMT and strategic cognition streams of research have not actively focused on individual strategy practitioners, or their development, and it was decided that a SAP perspective was more suitable and would not leave the research sitting in relative isolation.

In summary, this section has focused on identifying three important aspects that form the methodological foundation of this research and upon which the selection of the method is based. Firstly, it located the researcher's worldview within the broad constructivist paradigm. Second, it briefly examined the historical roots of this tradition and then used Guba and Lincoln's (1994) understanding to identify the ontological, epistemological and methodological assumptions on which the paradigm is based. This

discussion demonstrated alignment between the researcher and the nature of the paradigm. Finally, the SAP perspective was demonstrated to be appropriate for this research.

3.3 THE METHOD

Having established that the research will be conducted within a constructivist paradigm employing a SAP perspective, the aim of this section is to present how the method was selected. The section starts by discussing the research approach and describes how an inductive method was suited to the explanatory nature of the study. It then identifies the narrative-biographical perspective as being well-suited for collecting the required data and, within this perspective, a narratives of practice approach employing a responsive interviewing technique was selected as the most appropriate research instrument. The selection of a narrative analysis approach using a thematic analysis is discussed and justified before the section concludes by discussing aspects of data reliability, data validity and the research ethics considered for the study.

3.3.1 RESEARCH APPROACH

The purpose of this section is to describe the logic that was employed when developing an appropriate approach for this research. It will be shown that, as the research is seen as largely exploratory, an inductive approach using an interview instrument was the logical overarching philosophy for this research.

The first area for consideration when selecting an appropriate research approach is the purpose of the research. Robson (2002) classifies research into three categories: exploratory research which is focused on what is happening, in order to seek new insights or assess a phenomenon in a new light; descriptive research which portrays an accurate profile of persons, events or situations occurring; and explanatory research which seeks an explanation of a situation or problem, traditionally in the form of causal relationships. Employing Robson's (2002) categories, it was determined that the research question was best suited to an exploratory study as the goal was to shed new light on the practice development of strategy practitioners.

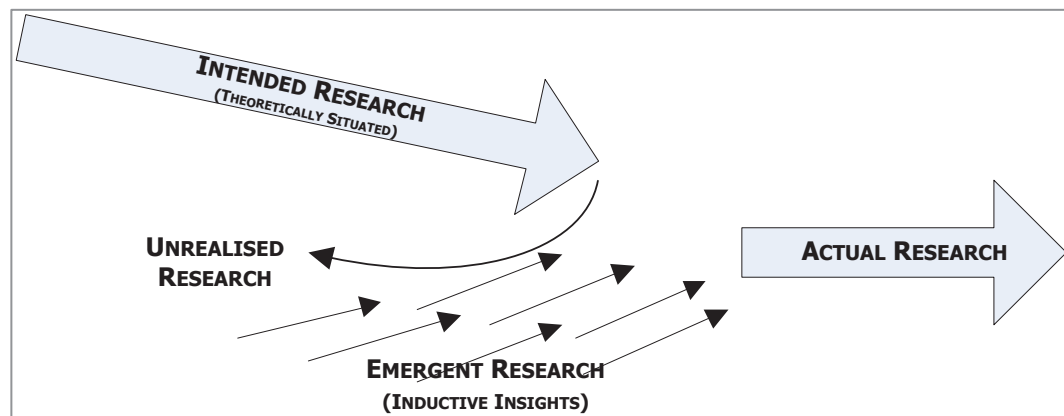
The next area in question was whether to employ an inductive or deductive approach. According to Charles Pierce (in Aliseda, 2006), there are three basic types of logical reasoning: deduction which proves something must be; induction which shows that something is actually operative; and abduction which merely suggests that something

may be. While an exploratory study tends to suggest that an inductive approach should be employed (Robson, 2002), a deductive approach still needed to be assessed for appropriateness.

It was determined that employing a deductive approach would pose two major problems for this study. Firstly, it would typically necessitate the development or selection of a theory and a rigorous methodology to test the theory in line with the scientific method (Ragin & Amoroso, 2011). This approach was seen as problematic, however, for an exploratory study. It was also considered that the establishment of a theory may limit the ability of the research to consider alternative possibilities or uncover new insights that may shed light on the development of strategy practitioners. Mintzberg's (1979) view on this is quite appropriate, 'it is discovery that attracts me to this business, not the checking out of what we think we already know' (p. 584). Second, a deductive approach typically places a priority on directly observable phenomena and behaviour (Saunders et al., 2009) which, as has already been discussed, is unsuited to answering the research question. The emphasis is primarily on discovering a cause-and-effect relationship between the variables researched (Saunders et al., 2009) and this approach is not aligned to an constructivist paradigm.

An inductive approach, on the other hand, allows understanding to emerge from what is discovered. This approach is tightly aligned with research in that it seeks to explore a phenomenon in order to understand what is occurring. Therefore, for this research an inductive approach was selected as the most appropriate approach to answer the research question. Importantly, Gill and Johnson (2010) argue that theory inductively developed out of rich, empirical data will be useful and resonate with practising managers which, while not an explicit goal of this study, was also considered to be advantageous. It is worth noting that an inductive approach has parallels with Mintzberg and Waters (1985) classic view on the strategy process as depicted in Figure 3.2.

Figure 3.2 – Inductive research model.



Source: Adapted from Mintzberg and Waters (1985).

An inductive approach is not, however, simple and prescribed and there are a range of options which needed to be assessed. Johnson, Smith, and Codling (2010a) observe that inductive research and analysis is often synonymous with grounded theory (Glaser & Strauss, 1967), but grounded theory has a specific set of requirements and enforces a relatively prescribed approach. Eisenhardt (1989) observed that new methods for conducting inductive research have emerged from a range of scholars and researchers such as Miles and Huberman (1984), Gersick (1988) and Eisenhardt and Bourgeois (1988). Eisenhardt (1989) further noted that there is confusion surrounding the distinctions among qualitative data, the role of literature, and the process of employing inductive logic. She argues that theory-building research should begin as close as possible to the ideal of 'no theory under consideration' and 'no hypotheses to test' (p. 536) but maintains that researchers should establish a solid research problem and have considered possible aspects of interest from the literature. The guidance of Eisenhardt (1989) resonated with the goals and logical approach for this research, irrespective of her view that neither theory nor hypothesis should be present.

The methodological foundations of the research, combined with the research focus, clearly indicated that the research conducted would need to employ a qualitative method. In order to collect meaningful data about the experiences of strategy practitioners it would be necessary to get close to them. Indeed, in order to understand what *they* considered to be the important factors in their careers required them to reflect and articulate this information. To achieve this outcome a number of approaches were considered. A survey instrument employing open-ended questions was briefly considered as this approach was, at least, efficient in terms of logistics. However, it was not

considered likely that participants would write at the in-depth, reflective level required no matter how well structured or engaging was the survey design. In many regards, this approach appeared to simply transfer the task of data collection from researcher to participant and this option was quickly rejected.

An ethnographic study, a popular method among SAP researchers and one that is advocated by some authors for practice based studies (Rasche & Chia, 2009; Vesa & Vaara, 2014), while allowing the development of rich, deep information, was also not considered to be practical or required for this research. The approach would require a degree of access to strategy practitioners that would be difficult, if not impossible to obtain within the limitations of a PhD research project. In addition, as the research question is focused primarily on the history of the strategy practitioner, as opposed to being able to observe them in episodes of praxis, this indicated that a close understanding of participants within their current work and social context was not required.

Employing an interview instrument emerged as the most logical approach to capture the required data. There are, once again, many variations that could be utilised when employing an interview instrument, but, given the historical nature of the information required, conducting interviews within a narrative-biographical perspective appeared to fit with all aspects of the research.

3.3.2 THE NARRATIVE-BIOGRAPHICAL PERSPECTIVE

This section examines the narrative-biographical perspective in greater depth. Merrill and West (2009) observe that the narrative-biographical perspective has been strongly influenced by the oral tradition and the Chicago School of Sociology, and that it is also part of the more general narrativist or subjectivist turn. This turn is in response to the marginalisation of the human subject in research (Merrill & West, 2009), a theme also at the heart of the SAP field (Jarzabkowski & Spee, 2009).

First, it is necessary to define the term narrative-biographical perspective in the context of this research as authors use a range of differing but similar terms such as life history, narrative, life writing and autobiographical methodology (Merrill & West, 2009). These labels are often employed to mean specific types of research in specific philosophical traditions using a narrow range of methodologies and hence their use can lead to assumptions and confusion (Merrill & West, 2009). For this research the definition employed is the broader version used by Merrill and West (2009, p. 10): 'research that

utilises individual stories or other personal documents to understand lives within a social, psychological and/or historical frame'. This perspective has historical roots in, and an affinity with, the Chicago School tradition and in the 1920s analyses of immigrant populations that were conducted using this perspective (Suárez-Ortega, 2013). Kelchtermans (1993), who employed the narrative-biographical perspective extensively in his research on the career development of teachers, noted that as a theoretical approach it is characterised by five general features; it is narrative, constructivist, interactionist, contextual and dynamic. Each of these five areas will be briefly discussed.

The narrative aspect refers to the key role that stories and story-telling play in the way meaning, as an idiosyncratic cognitive process, functions to organise elements and events into meaningful episodes (Polkinghorne, 1988) for individuals. Developments in cognitive psychology since the mid-1980s have been influential in demonstrating that individuals' actions are influenced by their cognitions (Kelchtermans, 2009). The strategic cognition stream of research is an example within the strategic management field where it was recognised that individuals' cognitive representations were important aspects to be researched if a full understanding of strategic action was to be developed (Gary & Wood, 2011). However, it is of interest that relatively few authors in the mainstream strategic management field, let alone the strategy cognition sub-field, have actually employed the narrative methodology (Rouleau, 2010) as a way of understanding the thinking and motivation of strategy practitioners. The narrative turn appears to be gaining in popularity and is now reported to be influencing disciplines such as history, anthropology, sociology, law, medicine, psychology and communications (Riessman, 2008), as well as professions such as law, medicine, nursing, social work and education (Liamputtong, 2009). Studies of strategic management, and management in general, are starting to employ this methodology more commonly via practice based perspectives such as SAP, but it still remains relatively underutilised at the time of writing.

The constructivist and interactionist aspects of the narrative-biographical perspective reach back to its philosophical foundations within the Chicago School of pragmatism, symbolic interactionism and ethnomethodology (Apitzsch & Inowlocki, 2002). This area has been discussed in the Methodological Foundations section of this thesis and these characteristics of the narrative-biographical method demonstrate further the alignment between the method and methodology.

The observation that the narrative-biographical perspective is contextual acknowledges that participants do not make sense of their experiences or reflect on events in mental isolation (Kelchtermans, 2009). Narratives are *always* presented in their context, the physical, institutional environment involved as well as the social, cultural, and intrapersonal Lifeworld (Kelchtermans, 1993). The LifeWorld (or *Lebenswelt*), which originated with Husserl, can be defined as the world of everyday experiences (Mann, 2011). As participants tell their stories, these are all set in specific times and environments (Kelchtermans, 2009) but are informed by their, and the environment's, current time and context. This aspect was well illustrated by Rosenthal (1998 in Wengraf, 2000) who, in an attempt to document the war record of ex-Nazis, observed that the current environment and context had to be taken into account when analysing their narratives. Had Germany been successful in its ambitions then the narratives would undoubtedly have been considerably different.

Finally, there is a dynamic characteristic to the narrative-biographical perspective. Aligned with the methodological foundations of this research, participants' stories are not static, nor true nor factual aspects of historical record. They are dynamic and consist of the participants' idiosyncratic meaning-making version (Riessman, 2001) at the time of narration. It is recognised that participants continually reinterpret and construct their past during each narrative episode and, therefore, different settings, contexts, questions and people present will result in different narratives. For example, a journalist would likely be given a more guarded, possibly sanitised, version of events than a researcher who has given an assurance of confidentiality.

Feminist researchers provide a good example of the narrative-biographical perspective in practice. Feminism, a philosophical tradition with a strong connection to the Chicago School tradition (Ransome, 2010), used the narrative-biographical method to challenge the ideas of conventional research that they viewed as patriarchal and phallogocentric (Merrill & West, 2009). Biographical work became an important part of the feminist movement because it was able to focus specifically on individual women, which allowed women readers, in particular, to identify with the person and the research (Reinharz & Davidman, 1992). Reinharz and Davidman also observed that the biographical method had the potential to 'repair the historical record' (p. 126).

SAP has, more recently, employed the narrative-biographical perspective amongst its relatively wide range of methodologies. Rouleau (2010) has been at the forefront of

discussing how this perspective allows a way to examine and understand how managers and other strategy practitioners draw on their explicit and tacit knowledge when they are strategising. Rouleau investigated the perceptions of restructuring by interviewing middle managers about their careers, a restructuring experience and their perceptions of the future. Fellow SAP researcher Balogun (2003) enlisted managers who kept semi-structured diaries, a variation on a narratives of practice approach which will be discussed shortly, to examine middle managers and change. Rouleau noted that while the narrative perspective is being employed in a range of management fields, few strategy authors have taken an interest employing this methodology.

A narrative-biographical consideration provides a valuable methodological licence (Liamputtong, 2009) to generate novel and arguably 'more real' perspectives on important social phenomena, overcoming the tendency to over-simplify problems (Merrill & West, 2009). The biographical-narrative perspective has increased its reach in recent years (Suárez-Ortega, 2013) and has been influential in a number of social science fields including: education in the research of teacher development; social policy to observe the effects of economic change on different categories of people; political change in Eastern Europe and South Africa; and, carers and the cultures of care and crime (Merrill & West, 2009).

There are, however, criticisms of the narrative-biographical approach. Application of the method has been questioned as regards the difficulty in getting 'close enough' to participants to get a true picture of their stories (Liamputtong, 2009). Merrill and West (2009) also observe that criticism comes from post-structuralist perspectives influenced by the work of philosophers such as Foucault, who view power as a primary force shaping people, their actions, and, therefore, their narratives in ways of which they may not be aware. Questions of validity and trustworthiness for studies based on qualitative methods are also areas where issues are raised (Polkinghorne, 2007; Suárez-Ortega, 2013). However, Polkinghorne (2007) reflects that methodologies and methods which are embraced and popular among a field or group of researchers are subject to criticism from people who sit outside the particular perspective. To employ logic from Kuhn (2012), what differentiates the particular views is not rightness or wrongness but incommensurable ways of viewing the world and practising research (Hacking, 2012). Therefore the choice of research methodology and method are largely the result of the researcher's worldview and the research question. In the words of Tashakkori and Teddlie (1998) below:

Study what interests you and is of value to you, study it in different ways in which you deem appropriate, and use the results in ways that can bring about positive consequences within your value system. (p. 30).

Within the narrative-biographical method there is a diverse range of options to employ, such as ethnography, case studies, autobiographies and biographies, diaries, letters, photographs, performance (Suárez-Ortega, 2013), historical accounts, fictional novels or even fairy tales (Polkinghorne, 2007). Ultimately a narratives of practice method, which is discussed in the following section, was selected as the ideal instrument that would allow participants the opportunity to reflect and reconstruct the significant aspects of their career development.

3.3.3 NARRATIVES OF PRACTICE

'It's no use going back to yesterday, because I was a different person then.'

Lewis Carroll

This section introduces, outlines and discusses the selection of a narratives of practice approach (also referred to as narrative enquiry), a method commonly used within the biographical-narrative perspective, for this research. Narratives of practice can be defined as specific life stories that focus on work experience and professional trajectories (Bertaux, 1997 in Rouleau, 2010). Rouleau (2010) puts forward the argument for greater use of a narratives of practice approach within the SAP and management research agendas. These types of narratives that focus on work-life and experience are also referred to as 'career stories', a term Kelchtermans (2009) employed in his research into the career development of teachers. To be sure, teachers are likely to have a reasonably common educational background and career development path, which is not the issue here. It is that the technique has been used in a context-widening application in the recent past.

While a narratives of practice approach may not currently be widely used within the strategic management, or even the management, academic community, in a more general form it has been extensively exploited in the popular management arena, becoming a minor literary genre (Schoenberger, 2001). Business bookshelves contain the life and career stories of well-known business identities such as Richard Branson or Bill Gates. It is argued that the focus of this genre, and indeed the concept of the business celebrity, does not contribute to the generation of knowledge, in particular

academic knowledge. Rather the genre's focus is to industrialise the individuals (Guthey et al., 2009) or legitimise the power they, and the organisations they represent, have (Schoenberger, 2001).

The narratives of practice method within academia is arguably at the diametrically opposite end of the continuum to the method employed in the production of biographies within the popular management domain. Within academia, a narratives of practice method seeks and examines the lived experiences of participants and the meaning they have ascribed to these experiences (Suárez-Ortega, 2013). It is suggested that popular management biographies are, in the main, analogously two dimensional and show the public-facing aspects of the celebrity concerned together with a chronology of his or her 'stellar' career. Guthey, Clark, and Jackson (2009) related an observation from an insider in the publishing industry - 'when you publish these books [business biographies] you have to work on the assumption that most people who buy it won't read it. It needs to be seductive for reasons other than content' (p. 52). Narrative enquiry, on the other hand, seeks to understand individuals in three dimensions, endeavouring to uncover the thoughts, understandings and meanings of the individual. The SAP agenda is logically aligned with this goal as it seeks to increase the depth of knowledge regarding what is really happening when strategic management is practised.

There are two classifications of the narrative method depending on the purpose of the research (Polkinghorne, 1988). The first kind aims to describe what is happening by using narrative accounts and the second kind aims to explain why a situation has happened (Polkinghorne, 1988). For this research the focus is on the former and aims to describe how strategy practitioners develop the practices they employ although, and more in line with Robson's (2002) classification of research, the goal is closer to exploration than description. The narratives of each participant provide the retrospective meaning allowing an exploration of the life events and experiences that account for their practice development and the participant's subjective consciousness is given priority (Suárez-Ortega, 2013).

The next question that was addressed was how to collect the interview data within the narratives of practice method. Rubin and Rubin (2012) categorise qualitative interviews into four types; focus groups, internet interviews, casual conversations, and semi-structured/unstructured interviews. Focus groups were not appropriate even if it was logistically possible to gather together participants, as they would be unlikely to discuss

personal experiences within a group of people that they may be acquainted with but do not know well. It was thought unlikely that internet interviews, where questions and answers are sent back and forth via e-mail, would allow for the required development of rapport with the participant and subsequent reflection and was, therefore, considered inappropriate. Casual conversations are normally held as a part of an observation phase of a research project or a means of clarifying points. This option was simply unavailable. This left the logical, and more traditional, semi-structured or unstructured interviews. A semi-structured approach was ultimately selected as it allowed a number of topic areas of interest in the research to be identified to help guide the interview. This is in line with Suárez-Ortega (2013) who noted that interviews are not informal conversations and require implicit structure to stimulate discourse. In line with Mantere (2008) the goal was to let the participants describe their history as freely as possible and this approach also allowed the use of probes to 'dig-in' to areas that emerge during the interview and this was seen as a key strength of the option selected.

A responsive interview model was identified as being the most suitable from which to conduct semi-structured interviews. In a responsive interview the emphasis is on the fact that the interviewer and interviewee are both people and that they form a relationship during the interview (Rubin & Rubin, 2012). Two further characteristics of the responsive interviewing technique that suited this research were researcher experience and flexibility. Participants in the research, according to Rubin and Rubin (2012), can be regarded as 'technical experts' (p. 176) and they note that if the researcher is able to appear knowledgeable and competent in his or her field then participants are more likely to become engaged in the interview process. The second characteristic is that the research design is able to remain flexible throughout the project (Rubin & Rubin, 2012). This means that if new information, or a new area of interest is uncovered then the current interview, and subsequent interviews, can probe this area allowing the development of a relationship between what is known, and what one needs to know (Morse et al., 2002).

The choice of an interviewing approach, however, presented issues which needed to be addressed. In particular there was a methodological challenge through the use of interview data as the basis for generating the evidence for this research. There is an assumption that what people say during an interview can be treated as a direct expression of their experience and, according to Silverman (2011), this assumption is problematic. People's memories are representations of past events and can be subject

to variation based on a wide range of factors such as length of time, location, mood or situation. Qualitative inquiry often sits on what Gubrium and Holstein (1997, p. 101) termed the 'lived border of reality and representation' and while the positivist view asserts that there is one reality, other philosophical stances accept that there can be as many realities as there were people who were part of an event, if not more. This methodological challenge presented an issue for this research as the evidence that was developed is based on the recollection and representation of interview participants. This is ground that has been well covered by a number of authors who have provided invaluable reading including, but not limited to, Denzin and Lincoln (2005); Riessman (2001, 2008); Polkinghorne (2007); and, Gubrium and Holstein (1997).

To answer the challenge it is first important to reflect in greater depth on the ontological assumptions under which this research was conducted. They are, naturally, aligned with the methodological perspective under which the research is being conducted.

- The participant's subjective consciousness is given primacy (Suárez-Ortega, 2013). Narratives are gathered not to determine if events actually happened but to understand the meaning experienced by participants and therefore narratives serve as evidence for personal meaning, not for the factual occurrence (Polkinghorne, 2007).
- The interview data is developed through the interaction between researcher and participant. Narratives are necessarily co-authored and are bounded by, and constructed in, relationships with various individual people (Williams, 1984). As noted previously, different settings and people present will alter the narratives collected.
- Participants' recollections are representations from the vantage point of their current reality and values (Riessman, 2001). In other words, participants' recollections and meaning comes from who they are today and not who they were at the time, reflecting Lewis Carroll's words that preface this section - 'It's no use going back to yesterday, because I was a different person then'.
- In interpretative tradition, multiple realities exist and are not fixed. People interpret events differently and therefore there is not one common, shared reality or history. Over time, peoples' interpretations will change as they change and therefore an individual's reality is never fixed.
- Most importantly, a participant's interpretation is *reality* for him or her.

The methodological challenge relates to participants being able to develop an accurate picture of their past, if that is indeed possible. The question is sometimes posed whether participants even know themselves where their skills and abilities came from and that it is, therefore, questionable whether a researcher can rely on this information. This presents what can be described as 'nth degree logic'. If that logic is followed to the nth degree then it is not possible to ask anyone anything as his or her recollection, introspection or representation is not viewed as reliable. The black box of cognition is viewed as an unreliable witness and, therefore, closed and a normal science paradigm is required to employ observable and quantifiable characteristics. The problem with this is that many subjects of interest in management and strategic management, including the focus of this research, are only researchable by listening to what they have to say, and opening their own black box.

Importantly, this challenge appears to contain the implicit assumption that the research is focused on developing an accurate picture of the past. This is, however, not necessarily the case and that is simply an incommensurate goal within the methodological traditions under which this research is being conducted. Participants' narratives are meaning-making units of discourse and of interest precisely because they interpret the past and provide *meaning* rather than reproduce a factual account of what happened (Riessman, 2001). A 'factual' history would present events, such as, obtaining an MBA degree but provide no clue as to the value or importance of the degree to the individual. Indeed 'factual' histories would appear to leave room only for simple, high-level demographic variables akin to the TMT tradition.

It is the word 'meaning' that is a key for the interpretivist perspective (Rubin & Rubin, 2012). The critical events that shaped participants' strategic practices are likely to be more obvious to them in retrospect. A conference, book or colleague may seem innocuous at the time but may in fact be a pivotal moment. It is participants' reflection on and interpretation of events and the meaning they attach that provides the in-depth insight.⁷ Therefore this research adopts the methodological stance that is concisely summed up by Rosenblatt (2003):

⁷ In my own case, for example, I attended a strategic management course in Australia that, whilst fascinating, seemed of little consequence returning to my job as an IT manager. Many years later now working in, and researching, strategy I can see its significance and pivotal impact on my development and career. I can go deeper and reflect that it was the quality and passion of the presenter that brought the subject alive and kindled my interest in strategy.

I do my interview research because I think I can get closer to whatever is “right” by hearing what people have to say. When, for example, bereaved parents tell me about their grieving and their closest relationships after their child’s death, I believe I am learning something that is real and true for them. I am not simply learning their stories. When I hear similar stories from many bereaved parents, I think I am learning something about parent grief. I don’t think I am learning immutable truths, but I think I am learning something important about many bereaved parents. (p. 226)

It is worth rephrasing (for consistency in the first person) the view articulated for the current research.

I do my interview research because I think I can get closer to whatever is “right” by hearing what people have to say. When I interview strategy practitioners about the key influences in their careers that contributed to their strategic ability, their reflections are real and true for them. When I hear similar stories from many strategy practitioners I think I am learning something about how practitioners develop their strategy practices. I don’t think I am learning immutable truths, but I think I am learning something important about strategy practitioners.

3.3.4 NARRATIVE ANALYSIS

This section discusses the narrative analysis selected to analyse the data collected from the interviews in order to build clear and convincing answer(s) to the research question (Rubin & Rubin, 2012). There are many different ways of analysing qualitative interview data and the method selected needed to be aligned with the research methodology, method and research question. A range of analysis techniques were considered before settling on a thematic analysis.

Content analysis, a process that effectively converts qualitative data into quantitative data, was not selected as this approach runs counter to the methodological foundations of the research. Grounded theory (Glaser & Strauss, 1967) has proven to be a common method employed but this method is relatively systematic and is built upon constant comparison in which data are collected and analysed simultaneously, and theoretical sampling – the data collected next is determined by the theory being constructed (Suddaby, 2006). The research design was not based on grounded theory and, therefore, it would be inconsistent, at best, to conduct an analysis under grounded theory.

Discourse analysis was also considered but it did not appear suited to answering the research question nor the data collection method employed. Discourse analysis, which has many different theoretical and practical ways of being implemented (Gill, 2000), is generally more interested in analysing how the social world is created and maintained through language (Liamputtong, 2009). The focus in discourse analysis is on the discourse itself rather than the content of the narratives (Liamputtong, 2009).

In regard to the selection of a thematic analysis, it is important to state that for this research primary attention is on *what* is said rather than on how, to whom, or for what purposes (Riessman, 2008). Therefore, a form of analysis within the narrative tradition, often labelled a thematic analysis, was chosen. Braun and Clarke (2006) argue that a thematic analysis of collected narratives is ideally suited to identifying, analysing and understanding themes within the data. Riessman (2008) discussed the thematic approach to analysis and this was influential in the selection of this form of analysis as part of the research design. She notes that the primary interest is in generating thematic categories across individuals, similar in concept to a grounded theory approach.

Braun and Clarke (2006), whilst writing primarily for a psychology audience, provide a very useful and considered step-by-step guide to conducting a robust and rigorous thematic analysis. Table 3.1 is reproduced from their journal article and provides a good overview of what is required to ensure that the thematic analysis is well planned and conducted. This was employed during data analysis.

Table 3.1 – A 15-point checklist of criteria for good thematic analysis.

Process	No.	Criteria
Transcription	1	The data have been transcribed to an appropriate level of detail, and the transcripts have been checked against the tapes for 'accuracy'.
Coding	2 3 4 5 6	Each data item has been given equal attention in the coding process. Themes have not been generated from a few vivid examples (an anecdotal approach), but instead the coding process has been thorough, inclusive and comprehensive. All relevant extracts for each theme have been collated. Themes have been checked against each other and back to the original data set. Themes are internally coherent, consistent, and distinctive.
Analysis	7 8 9 10	Data have been analysed - interpreted, made sense of - rather than just paraphrased or described. Analysis and data match each other - the extracts illustrate the analytic claims. Analysis tells a convincing and well-organized story about the data and topic. A good balance between analytic narrative and illustrative extracts is provided.
Overall	11	Enough time has been allocated to complete all phases of the analysis adequately, without rushing a phase or giving it a once-over-lightly.
Written report	12 13 14 15	The assumptions about, and specific approach to, thematic analysis are clearly explicated There is a good fit between what you claim you do, and what you show you have done (i.e., described method and reported analysis are consistent). The language and concepts used in the report are consistent with the epistemological position of the analysis. The researcher is positioned as active in the research process; themes do not just 'emerge'.

Source: Braun & Clarke (2006, p. 96).

3.3.5 DATA RELIABILITY AND VALIDITY

Issues concerning data reliability and validity are now discussed as data collected through qualitative research is often seen as being more problematic than quantitative research (Polkinghorne, 2007; Denzin & Lincoln, 2008). Therefore, attention needed to be paid to ensuring that a data quality focus was maintained during all stages of the research process. This is in line with the approach advocated by Morse et al. (2002) who advise researchers to employ mechanisms throughout the research process that incrementally contribute to ensuring reliability and validity and, therefore, rigour. This is in line with similar advice from Kvale and Brinkmann (2009) who stress the importance of a constructive approach, that is a focus on quality throughout the research process, and offer a range of strategies for researchers to employ including: ensuring congruence between the research question and the components of the method; using an appropriate

sample consisting of participants who best represent or have knowledge of the research topic; and collecting and analysing data concurrently.

Data quality, reliability and validity were a key focus throughout the research process and the discussion of the steps taken to ensure reliability and validity occurs at appropriate points throughout this thesis. Prior to entering the field, methodological coherence was a key focus and has been discussed at length in this thesis to demonstrate that the research question, methodological foundation and method selected are indeed coherent. The selection of research participants is discussed in the next section and it will be demonstrated that the method employed allowed the selection of participants entirely appropriate to answer the research question. Finally, the selection of an appropriate transcription method and the concurrent collection and analysis of data which occurred during the research process, will also be covered in the following Method Application chapter.

3.3.6 ETHICAL CONSIDERATIONS

All research conducted by staff and students at Massey University is subject to ethical approval and is covered under the *Code of Ethical Conduct for Research, Teaching and Evaluations Involving Human Participants*. For this study two applications were required to obtain ethics approval; the reason for this concerned a change in focus as a result of feedback at the PhD confirmation event. It was originally considered that research into strategy practitioners could be advanced in a sporting field as a method able to cast light back on strategy practice development in a business context. The advice received was that this would, in all probability, require at least two, possibly three, PhDs and so the focus was directly placed back on the phenomenon of interest, strategy practitioners in a business context. Ethics approval had been granted prior to the PhD confirmation and as a result of the change in focus a second application was required. As the majority of the core elements of the method, the collection of narratives of practice through a responsive interviewing technique, had not altered, this was accepted as an alteration.

The ethics approval process at Massey University includes a screening tool and if all questions can be answered 'NO' then the research does not require a full application for approval from the Regional Health and Disability Ethics Committee. The research itself was deemed not to contain significant ethical considerations and, although it was submitted as a full ethics approval, this was done to gain experience with the ethics process. Of interest, an ethical aspect that was not expected arose during the data

collection phase of the research, and this is discussed in more detail in the Method Application section.

The research methodology was reviewed and approved by the Massey University Human Ethics Committee: Southern B, Application 11/79.

3.4 SUMMARY

This chapter has provided a detailed and sequential discussion of the research process and logic that was employed to identify the specific research question, the methodological foundation under which the research would be conducted, and the selection of the method best able to collect and analyse the data to address the research question. From the literature it emerged that little was known about how strategy practitioners develop their practices within both mainstream and SAP research. Furthermore, the impact that business schools and popular management have on the development of practitioners was also found to be under-researched. Therefore, the research questions that were posed were:

How do strategy practitioners develop their practices; the skills, abilities and knowledge they use during episodes of strategy praxis?

What part do business schools and popular management have in the development of strategy practitioners?

The methodological foundation for the research was established by demonstrating alignment between the researcher's worldview, the ontological, epistemological and methodological assumptions of the constructivist paradigm and the SAP perspective. These combined to provide a unified methodological foundation for the research.

The research was then located in the narrative-biographical perspective, a perspective that has been utilised within SAP research. An inductive approach using an interview instrument and a responsive interviewing technique was shown to be an ideal method for collecting the data. Further to this, the responsive interviewing technique would allow for 'close with' (Johnson et al., 2010b) relationships that would provide the environment for participants to reflect and narrate the meaning they took from formative periods in their career development. This was shown to be a pivotal aspect of the research methodology: participants' narratives were found to be meaning-making units of discourse and of interest precisely because they interpret the past and provide *meaning* rather than reproduce a factual account of what happened (Riessman, 2001).

A thematic analysis was selected to analyse the narratives collected. It was discussed that, for this particular study, primary attention is on *what* is said rather than on how, to whom or for what purposes (Riessman, 2008) and, therefore, a thematic analysis was chosen as it is, according to Braun and Clark (2006), ideally suited to identifying, analysing and understanding themes within the data. Finally, issues of data reliability, validity and ethical issues were briefly discussed demonstrating that these areas were addressed in line with scholarly advice.

The focus of the thesis now moves from research design to method application, formulation to implementation. It is worth drawing the parallel that if this was a traditional strategic management process, the work of the strategy practitioner (or consultant) would now be arguably completed and the plans could be disseminated for action. Just the invoice left to submit . . .

CHAPTER 4 - METHOD APPLICATION

'Why,' said the Dodo, 'the best way to explain it is to do it.'

Lewis Carroll

A narratives of practice approach using a responsive interviewing technique was the ideal research method for answering the research question, as has been discussed in the previous chapter. This chapter now describes the application of the method in detail and how the data was collected.

Whilst this chapter is written primarily in a linear fashion, with the analysis coming consequentially at the end of data collection, the actual process employed was an iterative process. The iterative approach is in line with the advice from recognised qualitative authors (e.g., Morse et al., 2002; Merrill & West, 2009), and data analysis commenced in tandem with data collection. The method selected allowed for the researcher to be a part of the conversation, a co-author (Williams, 1984), and reflection on what was said and the meaning participants placed on events and experiences allowed for the data collection and analysis to be integrated. Gathering field notes post each interview helped this process as they allowed an immediate opportunity for reflection and analysis.

A detailed explanation of the procedure employed to select participants is presented. The interview process is discussed in Section 4.2, from preparation and pilot interviews to how the interviews were conducted and, importantly, the rationale behind bringing the interviewing process to an end when it was considered that data adequacy (Morse, 1995) had been reached. The method that was employed for data transcription is detailed in Section 4.3 before moving to a detailed presentation of the data analysis in Section 4.4. Section 4.5 discusses data reliability and validity, as they occurred during the application of the research method.

4.1 SELECTION OF PARTICIPANTS

Researcher: Do you know any entrepreneurs that I can get together for this study?

Entrepreneur: I'm afraid you're going to have difficulty. The moment you go looking for them you won't find them.

Researcher: Really? Why's that?

Entrepreneur: Any call to gather entrepreneurs together is going to be problematic. Those who turn up will, in all likelihood, be 'wannabees'. I could give you some names but then you are buying into what I perceive to be an entrepreneur. Most don't know they are entrepreneurs. You see entrepreneurs I know don't go around saying 'hey look at me, I'm an entrepreneur'.

(Kirklev, 2010)

This section describes the approach employed to identify and select strategy practitioners for this study. Patton (2002) notes that qualitative research relies heavily on purposive sampling strategies allowing for the selection of 'information-rich' cases that let researchers learn extensively about the issues under examination. The focus of this research was on the practice development of strategy practitioners and, therefore, a selection method needed to be developed to identify individuals likely to be information-rich. However, the exchange at the start of this section raises, by analogy, an interesting question about how exactly to identify and select strategy practitioners.

As has been discussed in the literature review, job titles and other observable characteristics are frequently used to identify individuals or groups such as CEOs, top management teams or boards, all of whom could be considered as strategy practitioners for research purposes. This conventional approach, it is argued, tends to identify those responsible for strategy but does not provide an indication as to whether the individuals identified actively engage in strategic management. Strategic management does not have a qualification system, despite the active debate about the professional status, or otherwise, of practitioners. It was important for this research that participants were, or had been for significant parts of their careers, actively engaged as strategy practitioners and, therefore, an alternative purposive sampling strategy needed to be developed.

The population of strategy practitioners was considered, to use Goodman's (2011, p. 350) terms, a 'hard to reach population'. This he defined as 'populations for which sampling frames do not exist or are too difficult and/or too expensive to obtain' (p. 350). Purposive or judgemental sampling is appropriate in these situations if sufficient individuals are available to allow the researcher to select those that best answer the

research question (Saunders et al., 2009). A form of purposive sampling, intensity sampling, was selected as an appropriate method on which to base a selection method. Intensity sampling has a focus on selecting excellent or rich examples of the phenomenon of interest (Patton, 2002). The goal of the approach developed was to identify and select individuals who were both intimately involved in strategic management and could reflect and articulate their strategic management development. The former required a method to identify individuals with extensive strategic management experience and the latter could only be determined post-interview.

It was decided to use a selection process that employed peer recognition. Jarzabkowski and Whittington (2008c) noted that whilst the academic community may apparently know little of the values that constitute a strategy practitioner, the enactment of those values is perceived as skilled practice able to be detected by their peers. Schön (1987) notes that this is not typically based on professional knowledge or formal education but personal recognition of wisdom, talent, intuition or artistry. This suggests that the logic being employed is that strategy practitioners become visible during episodes of strategy praxis, which is when they are employing strategy practices. Peer recognition of a strategy practitioner suggests there is a shared understanding of what these practices entail. Therefore, it is the application of recognisable strategy practices during episodes of praxis that allows the label of strategy practitioner to be bestowed on an individual and not the other way around, that a strategy practitioner is able to be recognised a priori and his or her activities are categorised as strategy practices. For clarity the following analogy is employed. The practices of rugby are able to be observed and it can be concluded that the individuals engaged in these practices are rugby players. It is difficult to recognise rugby players when they are not engaged in rugby practices, the exception being some famous players, for example Richie McCaw. For this study the focus was on gathering recommendations of individuals who were known personally to the individual providing the recommendation⁸.

Similar processes to select participants based on a recommendation of peers have been employed, for example by Jarratt and Stiles (2010) who noted that in their sample, selected by employing a theoretical sampling criteria, many individuals were seen by peers as exemplars in leading strategy. Breene et al. (2007) used comparable logic when

⁸ All recommendations gained were of strategy practitioners that were personally known. No recommendations were received for celebrities such as Porter, Mintzberg or Iacocca.

selecting executives who were considered as individuals leading strategy. Rouleau (2010) employed closely aligned selection criteria by sourcing candidates through the expert opinion of personal contacts, MBA contacts and a firm specialising in executive career management.

The initial list of candidates developed included individuals known and judged by the researcher to be strategy practitioners, and through discussion with key contacts with strategy expertise within Massey University's School of Management. In addition, and aligned with Jarratt and Stiles's (2010) criteria, the candidates' backgrounds were reviewed to ensure they had extensive strategy experience. To facilitate this, publicly available information on the candidates was reviewed to assess whether their previous roles and experience were in line with what would be typically expected from individuals highly involved in strategic management. Sources used included company websites, and company documents such as annual reports and publishing databases. It is acknowledged that this step is aligned with researchers who have studied individuals and top management teams using demographic variables such as job title or education as a method for identifying their research subjects in the past. A key part to the selection method employed is that individuals were first identified from a peer recommendation and therefore needed to meet more than just this demographic criterion.

Additional candidates were identified through two methods. Firstly, by asking participants who they considered to be 'outstanding strategists' towards the conclusion of the interview; and secondly through contacts within various Chambers of Commerce. These additional candidates were reviewed in the same manner as the initial candidates to ascertain whether they were likely to have extensive strategic management experience. This is similar in form to snow-ball sampling, though it was employed as an extension to the intensity sampling approach and research participants were consulted as they were regarded as 'technical experts' (Rubin & Rubin, 2012, p. 176). Gile and Handcock (2010) note that this approach is useful where a network of social relations links members of the target population and individuals are able to facilitate access to other members. It is recognised that this method does not generally generate a probability sample and is, therefore, not suitable for producing data that can be confidently generalised (Magnani, Sabin, Saidel, & Heckathorn, 2005). However, a factor in the relatively high response rate was considered to be that candidates were aware that they had been referred by someone known to them, usually a former colleague (an example of an initial contact is presented later in this section).

A second perceived difficulty that the selection of an interview instrument created lay in the problem of access. It was anticipated that interview candidates were likely to be in busy, demanding positions and that gaining access to them may prove difficult. In addition, given the nature of the selection method, they would likely be geographically dispersed, a situation which would add to the logistics and cost of data collection. However, the research design developed was seen as the optimal method of obtaining the data required and, therefore, it was more a question of how to apply the method effectively.

It was decided that the initial preferred approach to candidates would be through a personal e-mail, rather than by phone, letter or other approach such as a generic e-mail. Contacting candidates through a phone call was not seen as appropriate even though it was the most direct of the approaches considered. Firstly, it was thought that, as the candidates were likely to be in busy demanding roles, gaining access to them on the phone may be difficult. Secondly, if access was gained then individuals may feel 'put on the spot' and forced to make a decision without, crucially, sufficient time to make an informed choice. Placing a candidate in this situation would be unlikely to start the relationship in a positive manner and would most likely result in a negative response. Thirdly, it was considered that it would be difficult to get the concept of the research across concisely within a limited window of opportunity. These factors, taken together, made a phone call a surprisingly inappropriate approach for this research.

The option to send a letter or e-mail enabled the research to be clearly and succinctly communicated. Ultimately e-mail was selected as the primary method for reasons of expediency and convenience both for the researcher and candidate. E-mail has become a common and effective business tool and it is significantly easier, and quicker, to send and reply to an e-mail than a letter.

Care and consideration were taken in crafting an e-mail message that was both informative and engaging. The e-mail message contained two main, but brief, paragraphs in which the goal was to promote the research, and researcher, to candidates, and ensuring that the message presented the research in the best possible light took time. In addition, a professional, well-presented information sheet (a copy is contained in Appendix 1) was attached to the e-mail providing more details about the research. This approach, it was believed, allowed candidates sufficient time and information to make an informed choice.

Where a candidate could be directly e-mailed (i.e., a personal e-mail address was known or the candidate could be directly e-mailed via LinkedIn, a popular business focused social media site), this was the primary method of contact. Where a direct e-mail option was not available, the same message was either submitted through what is the equivalent of an e-mail message via his or her company's website enquiry form, or an actual letter was sent with the same message (although laid out in the appropriate format). The information sheet was included with the letter but it could not be attached when a company website enquiry form was used. In these situations the message was amended to state that an information sheet was available if required.

The following is an example of the e-mail message sent and demonstrates that a friendly, conversational tone was employed and, also, that the approach to grammar was relatively relaxed. This style was considered to be an appropriate method to engage candidates and, if they elected to participate, was a good method for starting the process of building rapport. Slight tailoring of the message was required depending on the situation of the candidate.

Dear Xyz

I appreciate you will be busy so let me get to the point. After running my own consultancy business with a focus on business strategy for over ten years, I have become very interested in knowing more about the area and my PhD research (out of Massey University) is on strategic management and in particular on how strategists become strategists; what are the key events, experience, education etc that have allowed the development of a solid understanding of how to think strategically and make sound strategic decisions. To advance this my plan is to interview individuals who are viewed as strategists. 'Actual' strategists I have discovered are quite hard to identify!!

You were recommended to me by Xyz and I would really appreciate the opportunity to interview you for this interesting and potentially revealing research. I have attached an information sheet that provides a little more detail but essentially it will require 1 to 1 and ½ hours and will be relatively informal (I'm more than happy to buy coffee somewhere!!). All interview material will of course be treated as confidential.

If you are happy to participate then please let me know who is best to contact and I can organise a time and venue in the future that is suitable for you.

Cheers...

Of the candidates identified, it was decided to contact six initially to avoid being inundated early in the data collection process. The initial response from the six candidates was underwhelming with only one reply received from an executive assistant who replied that she would discuss the research with the candidate. While disappointing, it was not unexpected and, after a week had elapsed, a follow up e-mail was sent. The follow-up e-mail, quite remarkably given the silence experienced to that point, was responded to by three candidates who agreed to be interviewed.

There were 67 candidate strategy practitioners identified and 33 were contacted and invited to participate in the research. Of these, 21 agreed to be interviewed although, subsequently, three candidates withdrew due to time commitments. The statistics regarding the selection of participants are displayed in Table 4.1. The two main reasons for electing not to contact a candidate were that the background check was either inconclusive or there was insufficient information, or the individual's contact details were not able to be obtained. It is worthy of note that, although the numbers approached by methods other than a direct e-mail were low, all methods were successful at contacting candidates and generating positive responses.

Table 4.1 – Candidate/Participant response and participation statistics.

Contacted		Responded		Agreed		Participated	
Method	Num	Num	% contacted	Num	% contacted	Num	% contacted
Letter	2	1	50%	1	50%	1	50%
Via Website	3	3	100%	1	33%	1	33%
E-mail	26	19	73%	18	69%	16	62%
Mail (LinkedIn)	2	1	50%	1	50%	0	0%
Total	33	24	73%	21	64%	18	55%

By the conclusion of the data collection phase of the research, eighteen interviews had been conducted. Given the anticipated difficulty in gaining access to strategy practitioners, it was pleasing that 64% of people approached agreed to be interviewed. Participants were not directly asked why they elected to participate and it is, therefore, speculative to contemplate their motives. However, through the interview process, the

impression formed was that they were genuinely interested in the research topic and, in particular, the question of where they personally developed their practices. The interview process allowed participants the opportunity to reflect on their own careers and discuss themselves 'out loud', something they may not often have had the chance to do. Also, from the responses received, it appears that the use of a peer recommendation turned the initial contact from cold to warm and this, as was noted, is considered to be a factor in the relatively high response rate. By way of example the following response is presented.

Roger – sounds like a worthwhile project and if Xyz thinks it's a good idea then I'd be happy to participate. I'm going to be in Palmerston North on Wednesday this week for an Xyz board meeting, so I could do Wednesday afternoon (after 2pm) if that would suit.

Nga mihi and regards,

The final aspect that needs to be discussed regarding the selection of participants is the post-interview review process. It was important to ensure that participants demonstrated an understanding, even an affinity with strategic management, as well as being able to focus their narrative on their own personal development. While it is acknowledged that there is no precise method for determining a participant's strategic knowledge or ability, the research design was shaped by the observation (Schön, 1987; Jarzabkowski & Whittington, 2008c) that strategic management practice can be recognised by peers. The researcher's practical strategic management experience within a multi-national company and as a consultant allowed a judgement to be made during the interview as to whether the participants displayed a solid understanding of strategic management and had the ability to reflect on their careers appropriately. This process is similar to one employed by Dameron and Torset (2014), who eliminated some participants post-interview as they felt that they had not reflected on their own role in the strategy processes. While no participant was eliminated post-interview from this study, it is suggested that a possible reason for this is that participants were all identified through a peer recommendation whereas Dameron and Torset (2014) employed variation sampling. Although it is acknowledged that a peer recommendation is an entirely subjective measure, it appears that it may, nevertheless, be a relatively stringent criterion.

4.2 THE INTERVIEW PROCESS

The purpose of this section is to present and discuss the interviews conducted and the interview process as it occurred in this research. As has been detailed, a responsive interviewing style was selected. This is basically 'friendly' and 'gentle' with little confrontation and emphasises the importance of building a relationship of trust between the interviewer and the interviewee (Rubin & Rubin, 2012). This style was considered ideal for allowing participants to feel relaxed about reflecting on and recounting those experiences throughout their careers that they believed had a major impact on their strategic ability.

In addition, as the participants could be regarded as 'technical experts' (Rubin & Rubin, 2012, p. 176), participants are more likely to become engaged in the interview if the researcher is able to appear knowledgeable and competent in his or her field (Rubin & Rubin, 2012). In this case, the field of the participants, and that of the researcher, is strategic management. This aspect also allows a greater opportunity for the development of a relationship between researcher and participant and in some regards provides an alternative mechanism to the consideration that multiple interviews are required (Rouleau, 2010) in order to develop the required level of rapport. In saying that, it is acknowledged that multiple interviews would be an advantage although, for this research, this was deemed unattainable.

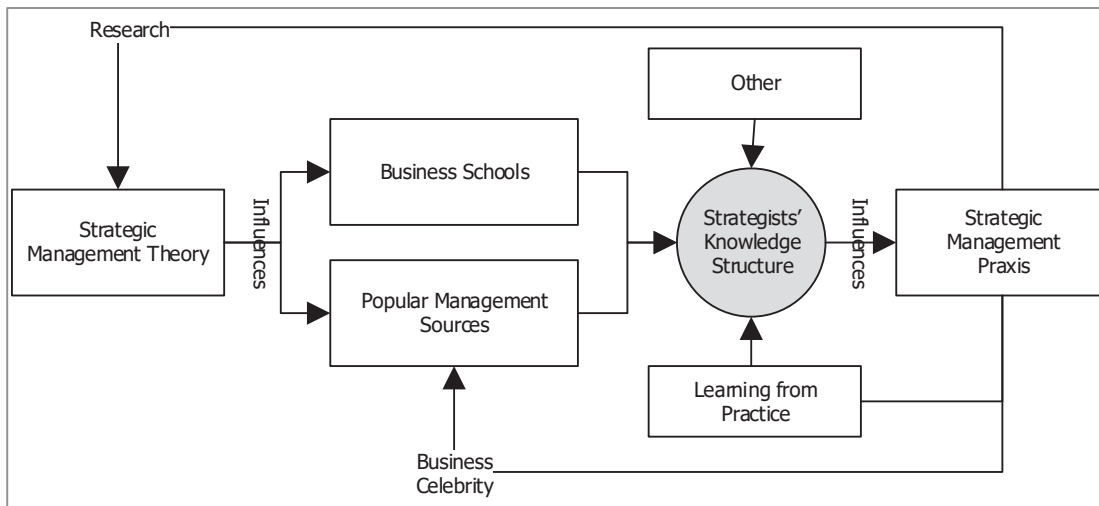
4.2.1 INTERVIEW PREPARATION

In order to maximise the effectiveness of each interview, preparation and planning are required. The anticipated professional and senior stature of participants meant the interview process needed equally to have a professional flavour throughout, though it was recognised that this needed to be balanced with the development of a 'conversational partnership' (Rubin & Rubin, 2012, p. 7). The goal was to develop both credibility and rapport, allowing the participants to feel relaxed and able to discuss their pasts thoughtfully and openly. A number of aspects were built into the interview process to achieve both these goals.

A semi-structured approach was selected as it allowed areas that, through the literature review, had become of interest as well as a basis to help guide the overall interview. This approach uses the concept of probes to be able to dig in to areas that emerge during the interview and this was seen as a key strength of the responsive interviewing technique selected. Figure 4.1 was developed, primarily from the literature review, to

identify the broad topic areas of interest on which the semi-structured questions (see Appendix 2) were based.

Figure 4.1 – Perceived influences on the development of strategy practitioners.



At the centre of this model sits the strategy practitioner’s knowledge structure (Walsh, 1995) with regard to strategic management. The model then identifies the major *perceived* sources of strategic management events and knowledge likely to influence a practitioner’s development. Business schools refer to what is learnt during episodes of management education though this area also has the potential to include other training providers such as corporate universities, private firms or in-house development. Popular management sources contains the plethora of popular books, magazines, websites, and business celebrities. What individuals learn in the workplace, what is learnt from-the-job or on-the-job, is identified within the ‘Learning from Practice’ aspect above. Finally, the ‘Other’ aspect is important as it identifies the opportunity to discover aspects not yet considered that may be integral to practice development.

A professional and informative information sheet (attached as Appendix 1) was provided to candidates in advance to allow them time to understand the focus of the research. On reflection, sending out an information sheet with sufficient detail allowed participants to start the reflection process in advance of the interview. Comments such as, ‘I’ve been thinking about this since we’ve been communicating’ (Prtcp2); ‘I’ve actually done quite a lot of thinking about this over the years’ (Prtcp11); and, ‘That was why I was intrigued by your question as to where did the genesis really start’ (Prtcp1) suggest that the information sheet provided the appropriate catalyst for the interview process.

The location of each interview was negotiated on a case by case basis but, as it was important that the location should allow participants to be able to relax, in the majority of cases the location was suggested by participants. The use of a café was suggested in the initial contact e-mail as it was thought that interviews held away from a participant's place of business lessened the chance of the interview being interrupted. Ultimately, as participants were providing their time generously, where and when they were able to be interviewed was the dominating factor.

As participants were all from business backgrounds, the normal, expected standard of business meetings was observed including punctuality and business attire. It was considered that this would help create the desired impression to achieve the goals of the interview regarding rapport and content. In addition, as technology can create issues, familiarity with the voice recorder was developed prior to the interviews. These aspects, and the interview focus, were all tested prior to entering the field through employing two pilot interviews.

4.2.2 PILOT INTERVIEWS

Piloting is a well-established practice that allows researchers the opportunity to 'test-drive' their data collection method and get feedback on how well it elicits the required information and data (Saunders et al., 2009). Given the responsive interview approach being employed, in conjunction with the newness of the researcher, it was considered a prudent approach to follow. Two colleagues within Massey University's School of Management who had an interest in strategic management were approached and agreed to participate. This also created an opportunity to get better acquainted with something that appears to be more problematic than it potentially should be in a university environment.

The pilot interviews provided a number of valuable insights into not only the data that would be collected, but the interview process itself. Neither pilot interview started well from a logistics perspective, which was unexpected given the researcher's experience as a management consultant. Dates, times and venues are part of the basics that must be right and the fact that both interviews started by getting these wrong was a timely reminder to extend the same robustness to the research/interview process as that paid to consulting engagements.

The key lessons from the pilot interviews were:

- Take the contact details of your participant, such as his or her mobile phone number, in case there is a mix up regarding the venue or time.
- Aim to be at the appointed location in advance as this gives you time to prepare, and relax. Arriving hassled and out of breath is not the desired first impression.
- Make sure information is provided prior to the interview but do not assume participants have read the information. They still need to be taken through what you are trying to achieve and why it is important, and any required agreement must be obtained.
- The interview warm up process and early conversation is very important as they provide the opportunity for you to establish rapport with the participant. It also allows you to demonstrate your interest and knowledge in the subject.
- Although it is important to put yourself in the conversation in order to develop a connection with the interviewee, this must be balanced against taking too much of the focus. It is the participant's experiences that are the focus of the interview and, although the nature of the interview technique requires engagement, the skill is in getting this balance right.
- Once the interview has concluded there are sometimes more insights provided as the conversation continues and so continue recording until the participant has left.
- Having background information on the participant assists in starting the interview and building rapport.
- Position the recorder on the periphery, and not between you and the participant, where it can appear intimidating.

The piloting process proved to be a valuable exercise and the fact that everything did not go exactly as planned gave rise to feedback and insight that allowed a number of issues to be addressed before moving into the field. There is only one chance to get the interview right and a direct result of the pilot process was the development of a checklist (displayed in Table 4.2) that was employed before and after each interview. The data gathered from the pilot interviews was not included in the study.

Table 4.2 – Interview checklist.

	Item	Check
Pre-interview	Cell phone (contact and acts as clock)	
	Interviewee cellphone number	
	Venue - where it is and how to get there	
	Background done (for interview start up)	
	Voice recorder with space	
	Skype recording ready (if applicable)	
	Spare batteries	
	Folders	
	Pens	
	Interview questions	
	Information sheet, Participant sheet	
	Participant sheet signed/agreed	
	PhD notebooks	
	Glasses	
Business cards		
Post	Complete field notes	
	Move files onto secondary device asap	

4.2.3 THE INTERVIEWS

Each interview was unique and, therefore, the purpose of this section is to provide an overview of the interviews in general by stepping through the typical process experienced. The general conclusion reached at the end of the interview process was that the responsive interviewing technique was an excellent method for obtaining insight and deep, rich data. The responsive interviewing technique was also an enjoyable method to employ and potentially made connections that could be valuable in future research endeavours.

Interviews commenced, after introductions, some general conversation and arranging coffee, with a brief overview of the research and the interview process. The goal was to ensure that the participants were aware of the nature of the research and their part in the research, and had signed the consent form. On reflection, and in line with Rubin and Rubin's (2012) observations, this time was very important in allowing rapport to build.

The initial question that commenced each interview was, 'what are the significant occurrences (events, incidents, issues) regarding strategy that made a marked

impression on you and helped shaped the way you think about and approach strategy?' The question allowed participants to start their narrative wherever they wanted though most interviews did not start in a work context and began with participants reflecting on important aspects of their early lives that were clearly very formative in their overall development. Participants tended to locate their career development within the broader story of their lives. This aspect was also considered an indication that participants felt sufficiently at ease with the process, and researcher, that they felt they could narrate aspects that were quite personal. The following is an excerpt from the start of an interview that demonstrates this point.

'I think you've probably got to go back a long time with me really. Probably going to tell you some things I wouldn't ordinarily tell you. I fought with my father and he was a relatively violent and vicious sort of a fellow. The consequence of that was I fled home when I was a 14 year old, just turned actually. I've been on my own ever since, made my own way. I put myself through another two years of school with part time work' (Prtcp13).

In order to develop a 'close with' (Johnson et al., 2010b) relationship Rosseau (2010) advised that it is often required to meet participants several times but for this study it was considered, in light of the time and resources required, that particular option was unavailable and unnecessary. Therefore, in order to build rapport, it was important to ensure all e-mail and phone conversations (usually to arrange a time and venue) were professional and courteous, allowing a situation where the relationship could develop as quickly as possible during the interview. Four participants were already known to the researcher and this was undoubtedly advantageous in regard to building rapport. The previous excerpt was taken from the start of an interview where the participant was known to the researcher. The following excerpt, however, is from an interview where the participant and researcher met for the first time and demonstrates that a relationship that allowed participants to feel safe recounting aspects of their past could be achieved without an existing relationship, and within a relatively short period of time.

'I'm not exactly sure, my father was a very stern person, born in the depression and it could have been that he thought if you were enjoying yourself you couldn't possibly be doing well. It could be that, I had some weakness in my learning style, when I was younger I was non-mainstreamed. So they used to send the school psychologist around to assess me and a

variety of other things and that went on for a number of years. Somewhere in the middle of high school they discovered that I was short sighted, couldn't see the board which is amazing. It's a cool little story' (Prtcp15).

The very personal nature of some aspects volunteered by participants during the interview raised an ethical concern that had not been anticipated during the design of the research. In short, it was not envisioned that participants would be traversing, or potentially reliving, parts of their past that may have caused them distress. It was thought that the narratives relating to strategic management development would be primarily within a business or education context but, as noted, a number of participants went into aspects of their personal history and narrated parts of their upbringing they believed were formative in their overall development. While no participant appeared to experience any discomfort or distress, it was an important lesson that, when research is focused on personal history, the potential exists for participants to recount stressful experiences and that mechanisms are in place to deal with these situations.

During the interview the semi-structured questions (see Appendix 2) were designed to be brief and open-ended to allow for an in-depth exploration of the topic. It was typical for the interviews to commence with the initial question posed and then the conversation would flow in various and unpredictable directions within the broad topic of developing strategic management practices. The semi-structured questions were ultimately used more as a check list to ensure all the identified areas had been fully canvassed. Often areas were discussed without the need to ask a specific question as the conversation had flowed naturally into the topic area.

Interviews were recorded and, in addition, notes were taken during the interview as this helped identifying particular areas of interest and served as an *aide-memoire* to allow particular aspects to be returned to and probed more deeply. Field notes were gathered as soon as was practical at the end of the interview including thoughts, feelings and observations pertinent to both the nature of the interview and the information discovered.

The ability to apply the responsive interview technique improved during the process and this was facilitated through taking field notes and thus allowing time for reflection. Lessons learned were able to be incorporated into subsequent interviews. It is important to recall at this point that the responsive interviewing technique recognises that interviewers are not expected to be neutral or automatons, and their background,

knowledge and how they present themselves affect the interview (Rubin & Rubin, 2012). Initially this balance between engagement and allowing the participant 'full reign' required active concentration but, through practice, it became easier to be aware how the interview was proceeding, and to adjust as necessary to maintain an appropriate balance. In addition, the ability to discuss strategy as a practitioner and develop subject matter rapport was immensely beneficial to the interview process and often resulted in animated, entertaining discussions and the odd burst of raucous laughter.

Of the eighteen interviews, ten were conducted in cafés, five in meeting rooms in the participant's place of business, two in participants' homes and one used Skype, a common video phone technology, which enabled a face-to-face meeting to be conducted with a participant in Australia. The location of the interview did not appear to have a significant influence on the interview process or data gathered. In every location, including the interview conducted via Skype, the interviews followed a similar pattern and the ability to develop rapport and create a relaxed atmosphere was more to do with personal interaction than the location or quality of the coffee. As previously noted, in the majority of interviews, fourteen, there was no pre-existing relationship and so the relationship had to be developed from scratch.

Regarding the use of a video-based interview, it was not originally planned to conduct interviews using video technology, and a trip to Australia was considered but the cost simply made this prohibitive. The candidate suggested that a Skype interview would be suitable for them and it was decided to employ that technology. The interview process itself was not significantly impacted by employing technology rather than a face-to-face interview. In fact it was difficult to note any discernible difference apart from a slight amount of hesitancy and delay experienced due to the technology. The fact that there was a pre-existing relationship in this situation may have assisted the interview process though, as it was the only interview conducted in this manner, that is not able to be substantiated.

A number of lessons, primarily learnt the hard way, are listed here in the hope that they may help others avoid the avoidable as well as providing a resource for future research endeavours.

- Practise asking the questions. It was noticeable during the transcription process that the questions posed were sometimes asked in a relatively verbose manner

and, although it was also clear that participants understood the question, the delivery of questions could have been sharper.

- Turn your mobile phone off or to silent. This is easy to miss and it is a distraction that is not required.
- If the location is a café, select a quiet table away from the kitchen, coffee making equipment, front door or cash register as these places invite noise. If possible, schedule the interview for an off-peak time, for example 11:00am or 2:00pm, as there will likely be fewer people and therefore less noise.
- Position the voice recorder with the microphone towards the subject and unobstructed. Recording interviews with it facing the wrong way, which is relatively easy to do, makes transcription more difficult. Placing a small arrow on the recorder as a reminder helped avoid this happening twice.
- Use reputable brand batteries as they last longer and are more reliable. If it is thought the recorder's batteries may fail then it can divert attention from the interview.
- If the location has a lot of background noise, try and position the voice recorder closer to the participant as it will make transcription easier. Baristas have developed a knack, maybe a delight, in seeing how loudly they can bang their coffee making equipment. Some recordings left the impression that shots were being fired.
- If the interview is using video technology, use a normal voice recorder rather than relying on software applications. Software can fail and, as the computer is being used for the call, restarting is not an option. A typical voice recorder will pick up the conversation as easily as if it was a face-to-face interview.
- If possible, get to the venue early allowing time to set up materials in a way that will make the interview flow. In cafés, bigger tables are better as they allow more space to spread out and take notes.
- If the interview is being conducted in someone's home, think twice before accepting coffee if not positioned comfortably at a table. Taking notes and balancing other materials makes drinking coffee a little fraught. While it is advantageous to make a lasting impression, spilling coffee on expensive Arctic white shag-pile is not the sort of impression that a researcher should like to leave. It did not happen, but there was a chance.

- If the participant indicates that he or she is under time pressure, it is still important to spend time creating rapport otherwise the early questions can be quite stilted until sufficient rapport is built.

Through the responsive interviewing process a large quantity of data was gathered. To reiterate, data elements should be self-sufficient and coherent points (Dey, 1993) and for this research the data elements were specified as narrative excerpts containing a single theme. Table 4.3 documents attributes of the raw data and displays; the elapsed time of each interview, the transcription word count, the number of unique data points and the percentage coverage of data points against the transcription text.

Table 4.3 – Overview of raw data.

Participant	Interview		Data	
	Elapsed Time (mins)	Words	Points	Coverage
P1	104.57	8,022	43	72%
P2	85.00	8,347	47	55%
P3	42.17	3,783	37	54%
P4	63.80	6,093	43	55%
P5	134.58	4,924	33	47%
P6	58.27	5,301	36	55%
P7	67.32	5,120	47	53%
P8	74.16	5,381	42	74%
P9	73.20	3,998	30	46%
P10	82.56	5,641	48	75%
P11	119.52	5,434	36	63%
P12	78.19	6,300	49	52%
P13	59.58	5,884	35	58%
P14	153.18	9,657	54	64%
P15	73.32	6,100	39	78%
P16	92.26	9,000	69	69%
P17	41.11	3,851	31	78%
P18	84.04	7,358	48	68%
Total	24.78 hours	110,194	767	62%
Average	82.6 mins	6,122	43	62%

As was described in the Method Application chapter, each data point was identified and coded into one or more codes and through this process the coding structures were developed. Figure 4.2, an Nvivo data schematic, provides a visual display of the spread

of the data. The size of each box reflects the number of excerpts in that code relative to all other codes. The full content of the node 'practice origins\ education\tertiary education\content' is included as an example in Appendix 3.

Figure 4.2 – Data schematic from Nvivo.



4.2.4 CLOSING THE INTERVIEW PROCESS

In line with most text books, Saunders et al. (2009) suggest that the researcher should continue to conduct interviews until data saturation is reached. However, Guest, Bunce, and Johnson (2006) note that while the term 'theoretical saturation' (p. 160) is commonly used in published articles, its meaning has become diffuse and vague. Morse (1995) defines saturation as having attained data adequacy and this is achieved, she notes, when additional interviews provide few, if any, new insights. In addition, Suárez-Ortega (2013) notes that in general, saturation within histories or accounts tends to be a relatively low number due to rich data from each participant. While general advice in regard to data saturation or data adequacy is provided in research methods texts, there is little guidance on how this should be assessed. As there is a wide variety of methodologies available, the question of how many interviews is enough to achieve saturation (Guest et al., 2006) is difficult. Therefore, the purpose of this section describes the process used to determine that data adequacy, employing this term rather than the more problematic saturation, had been reached. The question that was asked was, is the data collected adequate to answer the research question?

First, it is important to note that the group targeted, strategy practitioners, and the method employed to identify them was an important factor in the data collection process. As interviews were conducted and transcribed, and preliminary data analysis was conducted, light was being shed on the development of strategy practitioners but this did not alter the target group in the manner that some methodologies, such as grounded theory, would do.

With no exact procedure for determining data adequacy (Guest et al., 2006), the interview process continued until it became apparent that, as is suggested, no significant new insight was added by subsequent interviews. This is not to say that later interviews were not unique and fascinating, which they were, but the themes emerging added to the existing themes and categories rather than creating new ones. Interviewing in this study could have been stopped earlier than the eighteen conducted but this became obvious only in hindsight. This experience is similar to that described by Guest et al. (2006) who posited that they had reached data saturation after they had analysed twelve interviews (of sixty conducted), but it remains dependent on the complexity of and range of experiences, the level of granularity of which the research is conducted, and the concentration or otherwise of concepts.

There is also the issue of timing that impacts on the ability to close down the interview process. Participants who agreed to be interviewed were, in the main, busy and in demand and therefore interviews were often scheduled one to two months in advance. In fact a nineteenth interview was scheduled for approximately two months after the eighteenth was conducted but the participant withdrew due to time commitments.

How then does this research with eighteen responsive interviews compare to similar research in terms of the number of interviews conducted? Mason (2010) reviewed PhD theses that employed qualitative interviewing in terms of saturation and found a wide range of sizes were used, which is understandable given the wide range of methodologies employed. The mean number of interviews conducted was 31 and the median was 28 though with a relatively high standard deviation of 18, and Mason (2010) remarked that the distribution was bi-modal. Phenomenological interviews (mean = 25, median = 20), discourse analysis (25, 22) and life history (23, 20) studies tended to use fewer interviews. Of interest, the most common sample sizes were 20, 30, 40, 10 and 25 indicating that potentially the concept of saturation is not being applied at all in some cases (Mason, 2010).

The number of interviews conducted in this research is, therefore, not dissimilar to PhD level studies employing a qualitative, interview based approach. What is most important is that the number of interviews conducted, and therefore the estimation of data adequacy, was determined by the interview process itself and not a pre-determined number considered to reflect sampling adequateness. The conclusion drawn by Guest et al. (2006) that twelve interviews should suffice for most studies in which the aim is to understand common perceptions and experiences among a group of relatively homogeneous individuals, is interesting if perhaps a little dangerous.

4.3 TRANSCRIPTION

Transcription, it has been observed, has almost become a ubiquitous part of qualitative research that employs interviewing (Lapadat & Lindsay, 1999; Davidson, 2009). In a similar vein to justifying the method employed to select participants, it is important to discuss and justify why the approach used to transcribe the interviews is appropriate, and that is the purpose of this section.

Kvale and Brinkmann (2009) note that the rationale and methods for transcription are often omitted and, as the process involves transforming a live social, interactive event into a static textual representation, they argue it is important to state why and how this was performed. In addition they note that making transcription decisions explicit can add to the research's validity (Kvale & Brinkmann, 2009). Lapadat (2000) provides the guidance that if researchers recognise that transcripts are analytic and interpretive tools, then, rather than treating transcripts as the concrete facts of an event, they should be able to make appropriate decisions about transcription options.

Before discussing which type of transcription makes sense for the purpose of this research (Kvale & Brinkmann, 2009) it is important to identify why transcription was required at all. It was considered that there were two purposes for which transcription could be used in this research. Firstly, it could provide participants with an opportunity to review and amend the interview data and, secondly, as a method that would facilitate data analysis.

While it is common to give participants the opportunity to review and amend what they have said, during the data collection process, and in consultation with colleagues, it was determined that this was not a necessary step or one that would add value to the research process. In many regards, allowing participants the opportunity to edit and

correct also introduces the question of which reflection should be captured, the one while engaged in the responsive interview or that while reading and reflecting, or both. The interview was conducted in a specific manner to facilitate the generation of data but there would be no ability to know under what circumstances the data was read and edited. Without the ability to monitor the process it is likely that participants' attention on the requested task will vary considerably from no more than a cursory glance to a full reading and editing. Additionally, if transcripts were returned to participants then the transcription process itself would need to be reviewed, as Kvale and Brinkmann (2009) note, and consideration would need to be given to transcribing in a more fluent style to facilitate comprehension. Ultimately it was not concluded that this step would add value to the data collection process.

There was a strong argument that transcription offered considerable advantages when turning to the aspect of data analysis. From a practical sense a written text, whether on paper or in electronic form, can be operated on analytically and be quoted from, sorted, copied, and inspected (Lapadat, 2000, p. 204). Without a transcript it was considered that data analysis could not be conducted effectively and, therefore, it was determined that transcription was required for this research.

There are, however, a number of ways of approaching transcription as there is not an exhaustive transcription system that suits all research (Lapadat, 2000). What is important is that the method employed needs to be aligned to the research question and focus. Some authors (e.g., Poland, 1995; Kvale & Brinkmann, 2009) observe that because transcription is an interpretive activity of a human communication event it is simply not possible to create an equivalent textual representation. The key question, therefore, is the one Kvale (1995) asks: what is a valid translation from oral to written language?

As has been identified, for this research primary attention is on what is said rather than on how, to whom or for what purposes (Riessman, 2008) and, therefore, it was important to capture the stories of participants accurately, and in their own words, but recording how participants related the stories was not required for this research (Lapadat, 2000). A deeper level of transcription detail, as is recommended for conversation analysis, was not needed. Consequently all interviews were transcribed verbatim to create what Poland (1995, p. 291) defined as 'a faithful reproduction of the aural record'.

In addition, all pertinent aspects captured on the recording both prior to and after the interview were also transcribed. Where the interview conversation moved into unrelated areas, the topic of these was noted but not transcribed. To build rapport both before and after the interview a wide range of topics outside the focus of the research were discussed including for example, gardening, arm wrestling to settle a disputed invoice, and the chances of the All Blacks.

An example of the transcription is presented in Table 4.4, illustrating how the interviews were transcribed. Each row, which commences with a time stamp, reflects an individual speaker's part in the interview. The language was captured using basic punctuation but no attempt was made to make the text grammatically correct. Conventions were employed to allow the transcripts to reflect the conversation flow. For example, three dots were used to indicate where sentences were incomplete and, when short interjections or responses were made from the other participant, these were included in brackets within longer tracts of text.

Table 4.4 – Transcription example.

Time	Speaker	<i>Content</i>
20:46	RJM	MBA, what inspired you to do the MBA?
20:51	P6	It was a two year course and an engineering degree was a three year course. Basically I choose business.
21:10	RJM	So it wasn't a plan if I learn this stuff I can go...
21:23	P6	...No. It was more about, this sounds a bit negative, but which was the least painful alternative. I felt that I had got to a point, did you have an undergrad degree? (Yes, computer science). I felt the world was divided into those who had degrees and those who didn't and I think the only people who think that way are people that don't have degrees. So I felt a need, I had been expelled from Naenae College, to get a degree to prove myself and business seemed more attractive than engineering.

It is important to note that each interview was transcribed by the researcher and this proved an excellent method for getting much closer to the data, and the participant. Replaying the interview multiple times in sections during the transcription process meant the interview was able to be relived with a keen focus on what was being said. This allowed the development of a more in-depth appreciation of the narratives. During the actual interview there were distractions, especially in cafés, as well as having to focus on the interview process itself and this meant it was difficult to 'hang on every word'.

To gauge the amount of time the transcription process would take, the first interview conducted was transcribed taking note of how long this task took. The interview lasted 1 hour and 22 minutes and the transcription took approximately six hours to complete. The process was enhanced for subsequent interviews by employing a transcription kit which included a foot pedal providing the ability to start, stop and rewind the audio while allowing typing to continue. An additional feature was the ability to vary the speed of playback and, when the interview was slowed down, it made the process more efficient although it did make the interview sound like two drunks discussing strategy.

The transcription process allowed the interviews to be captured in a manner aligned with the focus of the research. In addition, by rehearing and reliving the interviews it was possible to achieve a much greater understanding of the data, and this added value during data analysis. This factor is in line with Merrill and West's (2009) observation that if the transcription is being performed by a third party, it is important to listen to, as well as read, the transcripts. To further facilitate this process, the use of time stamps during transcription allowed for the transcripts to be loaded into Nvivo, the analytical software application being used, and to be automatically aligned with the audio file. This made it possible to play back the interview at any point if clarification was needed or to get a better feel for a part of the interview.

4.4 DATA ANALYSIS

The purpose of this section is to document the process that was conducted to analyse the data contained in participants' transcripts. A thematic analysis was selected which is ideally suited to identifying, analysing and understanding themes within the data (Braun & Clarke, 2006). Riessman (2008) stated that the researcher's primary interest is in generating thematic categories across individuals, similar in concept to a more grounded approach.

There are a number of ways that codes can be applied to data and transcripts to allow for comparison and theme generation. Each line can be coded, for example. As a result of this, Dey (1993) suggests that it is important to make explicit the method for identifying the granularity of the data elements and the process of developing categories. According to Dey (1993) data elements should be self-sufficient and coherent points although, as Riessman (2001) notes, deciding the beginning and end points of narratives is often a complex interpretive task. For this research, the data elements were specified

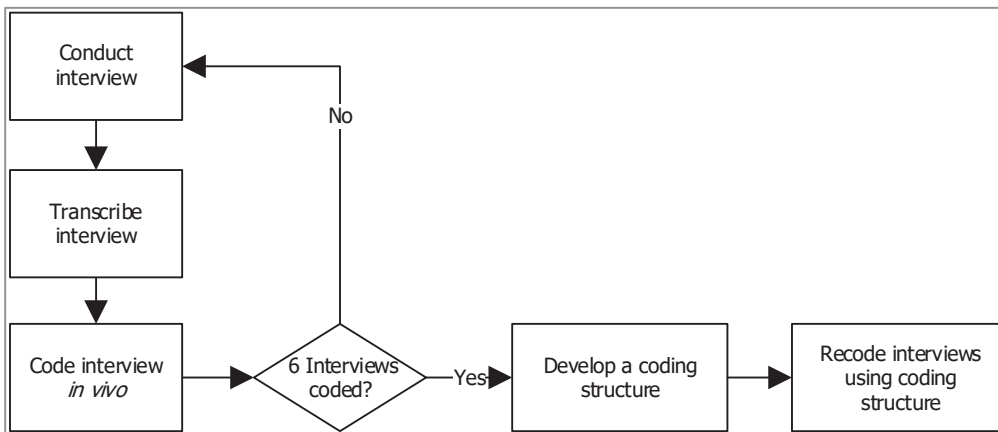
as narrative excerpts containing a single theme. These could be as short as a few words or extended commentaries as the following two examples demonstrate.

'It probably accumulated, you play board games you get a bit of strategic nous' (Prtcp17).

'The only person was at University, a guy called [name removed], a lecturer in organisational development, OB or OD or whatever it was called and he pulled strategy, people and leadership development really well. First person in a university environment that created tools that spoke to the student's different ways of learning. So he presented mind maps, he had the most effective PowerPoint presentations for visual people, he had immense reference texts for people who wanted to go away and look at that stuff and he had focus groups of people who wanted to learn. So he had an intuitive suite of teaching methodologies that just about energised everybody in his lecture theatre' (Prtcp14).

In accordance with the research design, data analysis began in parallel with the data collection process. A process, documented in Figure 4.3, was developed to facilitate the initial coding of transcripts. The first six interviews were coded *in vivo*, that is using the words and phrases provided by the respondents, and once this had been completed an initial, logical coding structure was developed to further facilitate analysis. The interviews were then re-coded using this coding structure. This structure was far from set in concrete at this juncture but allowed the data to inform the data collection process. As new themes emerged they resulted in the structure being reviewed and amended. During this process it was possible to determine that some themes were too general in nature and some too specific, resulting in a large amount of coded material in some areas and just one or two excerpts in others.

Figure 4.3 – Preliminary data analysis process.



The process provided a number of advantages but primarily it allowed the initial coding structure to emerge from the data. This helped avoid what Rapley (2011) warned of, closing down the analysis far too quickly and overly determining the shape and possibilities within the data. It is also important to note that the initial coding structure that emerged was influenced by both the data and the accumulated knowledge from the literature. As Dey (1993) observes, what matters in these processes is how, rather than if, existing knowledge is used during analysis.

Importantly this process, in conjunction with the responsive interviewing technique, facilitated reflection on what was said, and not simply the collection and processing of the data. It was through this process that a theme emerged from the data that added a dimension to the data collection process. This theme was that participants viewed strategic management holistically rather than as primarily a task in formulation as it is often viewed within the dominant strategy paradigm. This important theme will be presented and discussed in more detail in the Chapters 5 and 6. The following excerpts demonstrate the sentiments expressed that were captured within one of the initial codes, 'formulation and implementation'. A complete list of data in this code is provided in Appendix 4.

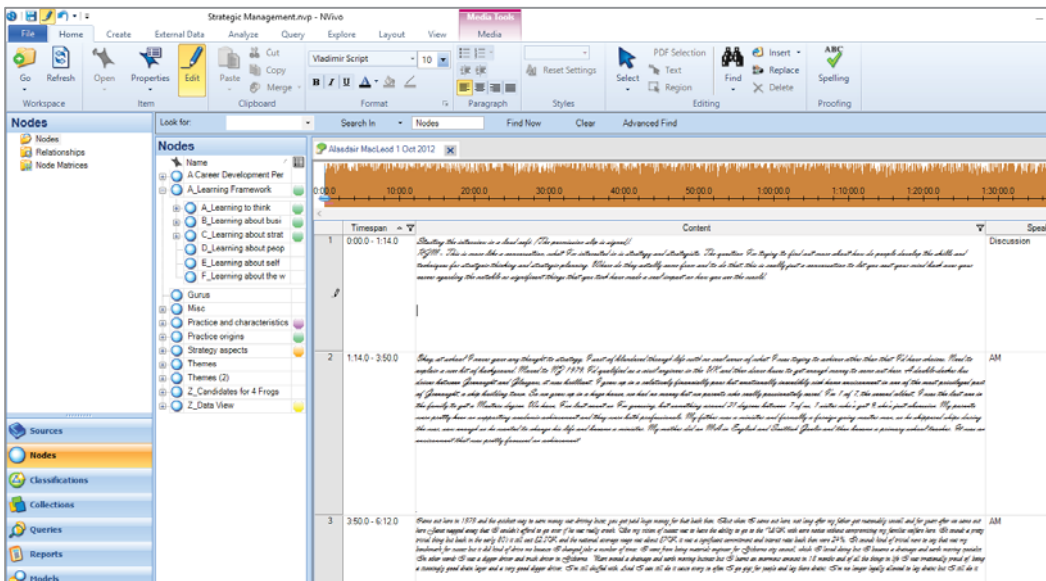
It all requires significant behavioural change but once I socialised that, I'm going to be quite hands on because I don't like sitting back and watching and I don't . . . There may be a role for a strategist who doesn't care about implementation but I don't think that's professionally and socially responsible.
(Prtcp1)

Bringing it down to the low level sensemaking. And those are the sorts of things that strike me as being important in the strategy space. Being able to go from the high level, being able to diagnose patterns and tensions in those patterns reasonably quickly and then translate them down to a low level. What does that mean to the person on the machine shop? How do you actually translate that in a meaningful way without being so grandiose and so highfalutin it is just a nonsense. (Prtcp9)

My experience would be if you're purely in the stratosphere the strategic part and the vision then quite possibly you're not going to see your vision or your strategy emerge because the day to day or the business as usual, unless you've got an implementation team that's brought into that, it's pretty hard to keep it going. (Prtcp3)

All preliminary analysis was performed within Nvivo which provided a range of benefits over notating the physical copies of transcripts. The software has a range of inbuilt functions that allow processes that would be time- and space- consuming to be performed with relative ease. For example, all aspects that had been coded to a particular node (Nvivo's terminology), for example 'tertiary education' can be examined without having to sort through each individual interview transcript. By way of analogy, Nvivo provided efficiencies over manual methods without sacrificing robustness in a similar way that reference manager tools, such as EndNote, provide efficiencies over manual collation of reference materials in earlier card systems. The following screenshot, depicted in Figure 4.4, of the Nvivo graphical user interface demonstrates how the material is presented to the user. The audio, transcribed text and coding are all easily accessible.

Figure 4.4 – Nvivo graphical user interface.



At the completion of the data collection process all remaining transcripts were coded using the initial coding structure. The purpose of this was to simply provide a mechanism to continue the data analysis process. In particular it allowed for the transcripts to be read both as whole accounts or for particular aspects, such as 'school' to be read across transcripts. Figure 4.5 documents the initial coding structure together with the number of participants (sources) and the number of excerpts (references) represented in each code.

Figure 4.5 – Initial populated coding structure.

Name	Sources	References
Practice origins	20	648
Strategic management education	15	62
Training and development	3	4
Tertiary education	15	58
People	4	4
Content	15	51
Literature	17	93
Non-management	2	2
Management	13	29
General or well read	13	23
Strategic management	15	39
Education	20	203
Topic specific	4	4
Self-education	6	24
School	10	23
Family and friends	10	21
Eclectic or Other	11	19
Tertiary education	19	112
People	10	23
Content	18	83
Learning from practice	20	290
Career history	7	18
Training and development	12	23
People	18	70
Experiences and events	19	179

Some points of clarification need to be made at this point. The number of sources and references were used entirely as a guide to analysis and not as a source of quantitative information. They provided an indication of coverage within categories, enabling categories with too few or too many references to be identified and combined or split depending on the material they contained. It should also be noted that there are more sources, 20, than participants, 18. This was due to some interviews being broken, by circumstance, into two parts. For example one interview started in a café and was completed back in the participant's office and this created two audio files and the software viewed these files as separate sources. This had no material effect on the data analysis.

As was expected, given the conversational nature of a responsive interview, there was a range of observations that, while related to strategic management, were not directly related to participants' career development. In particular these observations related to their views on the practice of strategic management and characteristics associated with strategy practitioners. These aspects were captured in ancillary coding structures as it was considered that this data may provide a different perspective and insight into their career development as well as potentially become a data source for possible related, future research questions.

At this point, therefore, the analysis had captured the participants' stories as narrated. Whilst this was valuable in starting to make sense of the data, it was, however, realised that it was a coding structure that, in many regards, reflected the interview process and did not entirely fit the research question in regards to participants' career development. Dey's (1993) advice that flexibility when building coding structures is important was useful as, after all, the goal is to understand and interpret the data to answer the research question and not simply create an efficient coding structure. It was decided to recode the data and for this iteration a coding structure was developed using a 'practitioner development' focus. Only the first level of the coding structure, for example 'A_Learning to think', was developed prior to recoding the data, while the lower level codes were, again, allowed to emerge from the data. This coding structure is displayed in Figure 4.6.

Figure 4.6 – Practitioner development focused coding structure.

Name	Sources	References
A_Learning Framework	20	616
A_Learning to think	17	90
Family	7	21
School	8	15
Self taught or directed	4	7
University	13	33
Work experience	9	12
Work related development	1	2
B_Learning about business, mngmt and strategy	20	174
From being in business	2	2
Literature	12	22
Management Training and Development	8	11
Self taught	8	14
University	16	42
Work experience	19	82
C_Learning about strategy	18	213
Literature	16	59
Management training and development	7	7
Other	3	8
University	15	38
Work experience	18	101
D_Learning about people	18	64
E_Learning about self	15	37
F_Learning about the world	13	38

The process of reading, and reliving the interviews, allowed, over time, for a deeper understanding of the data. At a conceptual level experiences and patterns began to connect participants who, on the surface, initially appeared to have had quite different developmental paths. The key part was recognising when participants were reflecting on their career development as opposed to describing their views on strategic management

practice. Through the interview conversation they naturally did both but it was their career reflections, and more specifically the meaning they placed on these reflections, that was the 'gold' in the data. Rouleau and Balogun (2011) noted similarly that what is required is an understanding at a deeper level of analysis as opposed to just what is said. It was this observation, or realisation, that resulted in the data being recoded for a third time, this time within a career development framework.

This third recoding step involved first identifying the meaning in participants' narratives and allowing a coding structure to emerge from these meanings. This was an important step in the analysis process as it allowed the meaning conveyed in the narratives to emerge (Polkinghorne, 2007). Polkinghorne (2007) notes there are two positions a narrative researcher can take in the process of interpreting participants stories: the *Verstehen* position treats the text as an object that can be understood; and the philosophical hermeneutic position holds that textual interpretations are always perspectival. In keeping with the underlying methodological foundation of this research, the position adopted for this research is that of the philosophical hermeneutic position. Participants' stories are interpreted by the researcher, and other researchers may interpret them differently. In other words they are not a concrete object with a prescribed meaning able to be identified and understood. The interview process employed allowed the researcher to be part of the conversation and, in this regard, placed the researcher in a good position to interpret the narratives.

This was, however, a delicate process as meaning was not usually directly articulated but implied by participants. For example, some excerpts spoke for themselves, 'that was one of life's defining moments for me because the guy I met' (Prtcp1). Others, equally, contained important meaning but were less obvious, 'I did a meta-analysis in the area I had been involved in, nobody had used the technique and I was interested in how this technique worked' (Prtcp15). The transcripts, therefore, needed to be read carefully and methodically.

The first interview recoded employing this process generated the initial list of codes and the emerging coding structure was modified as each subsequent interview was recoded. The final coding structure, which is reproduced in Figure 4.7, was relatively long, but in this iteration, important career development themes began to emerge through joining shared meaning and stories. Codes containing fewer than four data elements (the second

column in the Figure 4.7) were reviewed and incorporated with an existing code where this was appropriate.

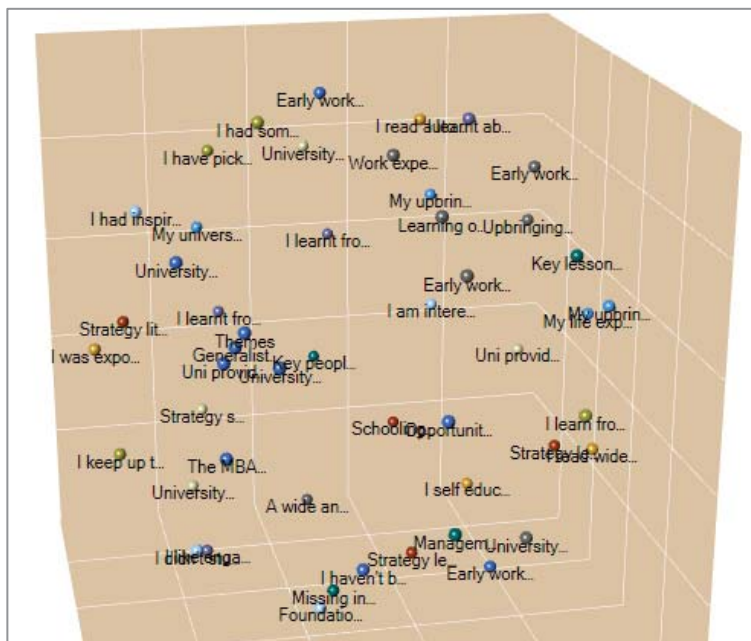
Figure 4.7 – Coding structure based on participants meaning (stated or implied).

Themes	20	435
Early work experiences taught me a lot about business and people	14	23
Early work experiences taught me a lot about planning and implementing	4	5
Early work experiences taught me a lot about problem solving	4	6
I didn't study management at university	7	8
I had inspirational University teachers	3	6
I had some management training but not specially strategy	6	8
I keep up to date	7	7
I learn from working with people in organisations	13	21
I learnt about who I was	15	38
I learnt from being exposed to a wide range of people	8	11
I learnt from key people who were informal mentors	9	21
I like engaging in strategic activities	2	4
I read autobiographies to understand how people think	5	6
I read widely, not specifically about management	5	6
I self educate when the need arises	9	10
Key lessons can come from eclectic places	10	19
Management and strategy literature provided some information but not much	10	23
My life experiences have taught me a lot about the world and people	3	5
My university lecturers were not very inspirational	6	6
My upbringing helped developed an enquiring mind	7	15
My upbringing taught me a lot about people and differences	3	6
Schooling didn't work for me	4	5
Strategy lessons are learnt on the job in successes and failures	12	30
Strategy lessons are learnt on the job in successes and failures (2)	12	30
Strategy literature didn't add much value	5	8
The MBA opened doors for me	2	3
Uni provided some foundational management knowledge	8	14
University business education didn't teach me a lot	16	29
University business education provided the opportunity to learn from other people	2	3
University education gave me confidence and contacts	3	5
University education was an opportunity to learn fundamental skills	10	21
Work experiences taught me a lot about the business world and people	15	33

The themes that are presented in Chapter 5 emerged, ultimately, from this coding structure. For the final iteration it was necessary to employ a more tactile method and the individual codes were printed and cut into individual strips of paper which were then arranged and re-arranged over several days until the final grouping was determined. Importantly at this point the themes felt like they made sense in terms of the research question. Not only did they represent the data, but they also represented the participants' stories and meaning. At the top level were five main categories; early career/education, learning from practice, learning strategy from practice, business school, people and literature. The result of the entire coding process was in line with the theories of Corbin and Strauss (2008), who likened the process to mining data to find the hidden gold.

Finally, it is important to note that while the computer software, *Nvivo*, provided a range of functions that on the surface facilitated data analysis, it did not have the ability to analyse the meaning of participants. For example, it would allow numerous queries to be run on the data and create interesting and sometimes impressive looking diagrams that were ultimately devoid of meaning for this research. The following cluster diagram, Figure 4.8, was developed using the data coded yet it shed little light on the phenomenon. In this regard, only the researcher was able to conduct the task of data analysis. The computer software saved many hours of administrative tasks and facilitated the data being looked at in different combinations but, like a hammer, it was only employed as a tool to gain efficiencies.

Figure 4.8 – Nvivo cluster analysis of the final coding structure.



4.5 DATA VALIDITY AND RELIABILITY

Aspects of data validity and reliability have already been addressed in this thesis and the purpose of this section is to document the steps that were taken after data collection to ensure that the research maintained its focus on validity and reliability. The aspects of methodological congruence, selection of participants, decisions concerning transcription and data collection and analysis occurring concurrently were discussed previously. The aspects that are covered in this section are interview quality, final data analysis and an overall reflection on validity.

The following criteria have been suggested by Kvale and Brinkmann (2009) as aspects that contribute to a quality interview.

- The extent of spontaneous, rich, specific, and relevant answers.
- Short interview questions and longer interviewee answers.
- The degree to which the interviewer follows up and clarifies meanings.
- The fact that the interview is interpreted throughout.
- Verification of interpretations throughout the interview.
- The interview is a self-reliant story hardly requiring additional explanations.

While Kvale and Brinkmann (2009) recognise that the criteria reflect an ideal interview, in the main the interviews conducted compare well against these criteria. Obviously, as the researcher was not an experienced interviewer, there were aspects that could be improved and through the use of field notes post-interview improvements were noticeable. In general, though, the interviews did produce rich and relevant answers to the research question and it is considered that the transcripts can be read without additional explanation (see Appendix 5 for an example transcript). The design of the semi-structured questions facilitated short questions and probes allowing the interviewee 'space' to reflect and recount his or her stories. Clarification of interpretation and meaning were sought where this was considered necessary although the researcher was hesitant to interrupt the stories of interviewees who were in full flight. Notes were taken during the interviews that allowed areas to be returned to without having to interrupt the flow of the interviews.

With regard to the final analysis, the process employed to put questions to the data (Kvale & Brinkmann, 2009) has been explained in detail. The data was inspected from a number of angles and was recoded three times as the analysis proceeded. It was the final iteration, when participants' meaning was the basis for the coding structure, that ultimately reflects the researcher's interpretation of the data. Adopting the philosophical hermeneutic position (Polkinghorne, 2007) it is recognised that participants' stories may be interpreted differently by other researchers but, through adopting all the previously discussed aspects of reliability and validity, it is considered that the interpretation of the data presented through the rest of this thesis is robust and fit for purpose.

Validity, according to Polkinghorne (2007), concerns the believability of a statement and is a characteristic given to a claim by those to whom the claim is addressed. As has been discussed, validity in qualitative research is seen as an activity that is conducted

throughout the research process (Morse et al., 2002; Kvale & Brinkmann, 2009) to convince readers of the likelihood that the support for the claim is strong enough to serve as a basis for understanding (Polkinghorne, 2007). Throughout the research process a focus on validity and reliability has been maintained which, it is argued, has added to the ability of the research to produce insight into the research area of focus.

4.6 SUMMARY

Considerable effort and attention to detail went into applying the method that had been selected. Initially the selection of participants was seen as an important aspect of the research given that much previous research had employed demographic variables in order to identify strategy practitioners. It was decided to use a selection process that employed peer recognition, which was similar to other studies (Breene et al., 2007; Jarratt & Stiles, 2010; Rouleau, 2010) in the management area. Once identified, candidates were approached primarily by e-mail and the process proved to be very successful at recruiting participants into the study.

The interview process itself, the heart of the study, was planned out in advance including the use of pilot interviews to sharpen both the semi-structured questions and the interview process. This delivered a range of lessons that sharpened the interview process. The interviews were very successful and produced not only rich, deep data, but they were enjoyable experiences for participants and the researcher. Of interest was the fact that many participants located their narratives within their general lives and narrated a number of quite personal stories that were clearly seen as formative in their development. Once data adequacy had been achieved, where each subsequent interview did not add significant new insight, the interview process was closed down.

The data analysis, which started in parallel with the data collection process, required three iterations before the interpretation of the data was considered to make sense in terms of the research question. At this point, the interpretation represented not only the data, but also represented the participants' stories and meaning. At this stage it was felt that the data analysis process had mined the data and found the gold (Corbin & Strauss, 2008). At the top level were five main themes; early career/education, learning from practice, learning strategy from practice, business school, people and literature.

Finally this chapter discussed aspects of validity and reliability that were employed throughout the application of the method that added to the study's robustness. The next chapter in this thesis, Chapter 5, presents the findings.

CHAPTER 5 - FINDINGS

'I know what "it" means well enough, when I find a thing,' said the Duck: 'it's generally a frog or a worm. The question is, what did the archbishop find?'

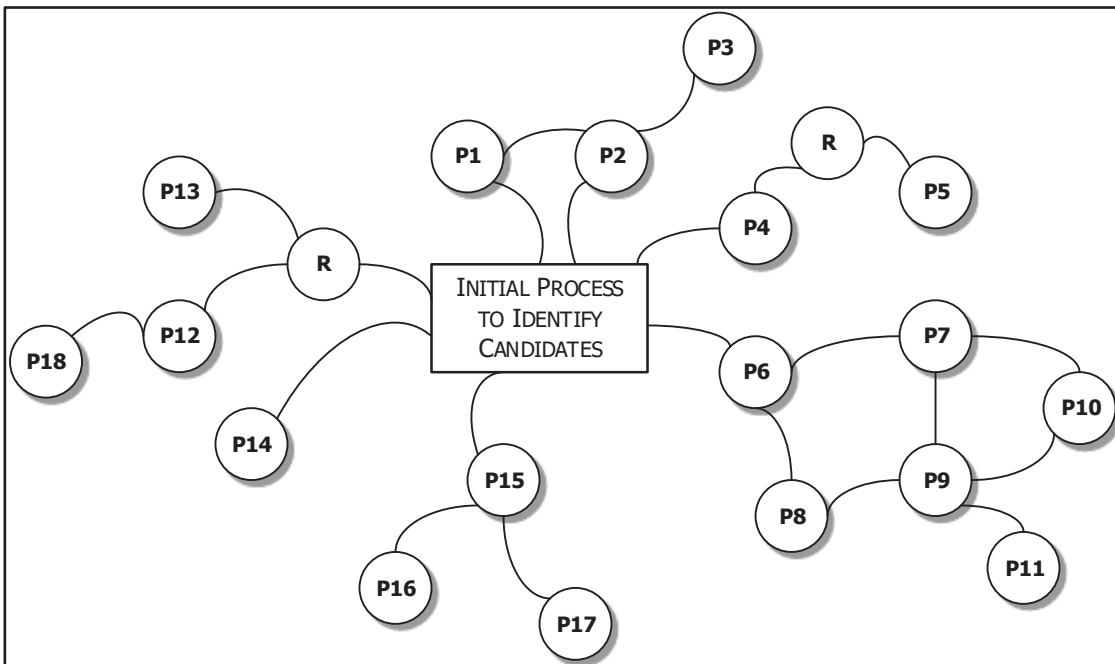
Lewis Carroll

The research question was focused on understanding how strategy practitioners develop their strategic management practices, and the purpose of this chapter is to present the key findings that emerged from the data analysis. The chapter begins by introducing (anonymously) the participants interviewed in Section 5.1 and provides some high-level information to allow the reader insight into the research participants. The first finding is then presented and discussed in Section 5.2 and this relates to how participants viewed strategy and strategic management practice as a holistic endeavour with the implementation of the strategy being a core part of practice. This finding is important because how participants viewed strategic management is tightly aligned to how they view their career development as strategy practitioners. When participants reflected on their career development they had this holistic view of strategic management in mind. This view of strategic management is then employed as the practice development of strategy practitioners is presented showing development to be idiosyncratic but conceptually similar. This finding is discussed in Section 5.3 under the oxymoronic, but apt, heading Similar Dissimilar Paths. The chapter concludes by summarising the findings in advance of the discussion chapter.

5.1 PARTICIPANTS

The selection of participants has been discussed previously and the purpose of this section is to present high-level information about the participants in order that they are illuminated for the reader. Figure 5.1 demonstrates the linkages between participants and how the peer recognition process resulted in the sample that was selected. The box in the centre of the diagram reflects the initial identification process described in Chapter 3. The circles denoted 'R' refer to a respected intermediary who, while not interviewed, was able to identify further candidates for the benefit of the research. In both cases the circles containing the letter 'R' are Chambers of Commerce or personnel within those Chambers (see Chapter 3).

Figure 5.1 – Participant linkages.



Of the eighteen participants the majority were male, fourteen or 78 percent, which was not considered surprising given the commonly recognised disproportionate male/female ratio (Rosenblatt, 1995; van Emmerik, Wendt, & Euwema, 2010) in senior positions in business and management. It was considered, at the start of the data collection process, that the sample selected could be entirely male but it was pleasing that a number of female strategy practitioners were recommended without this aspect having to be specifically requested.

The average age of participants, estimated to the nearest five years through a review of the interview data and secondary information as it was considered imprudent to ask this question directly, was 50 to 55 with the range being 35 to 65. The age range observed was in line with expectations as time and experience in strategic management roles was considered vital in order to be recognised by a peer as being a strategy practitioner. This aspect does raise an interesting question, potentially for future research, regarding the ability, or possibility, of being a young strategy practitioner if peer recognition is a criterion.

Table 5.1 provides high-level information on the backgrounds of participants: their position when the interview was conducted; an exemplar role from their career in which they would have likely been involved in developing and/or displaying effective strategic management practice; and details of their tertiary education. Participants' current and

exemplar roles cover a wide range of business situations in both public and private organisations and they have held, and hold, senior positions with a range of leading organisations in a diverse range of sectors and industries. The information on tertiary education is interesting, and is an area that will be discussed in greater depth in this chapter, as participants cover a range of disciplines and fields.

Table 5.1 – Background information of research participants.

Participant Background			
#	At time of interview	Previous/Indicative	Tertiary education
P1	Company Director (various)	Senior Partner - Global consulting firm	MBA
P2	Management Consultant (business owner)	In current role for over 30 years	Political Science Degree
P3	Deputy Chief Executive – Strategy (tertiary industry)	In current/similar role for over 20 years	Geography Degree
P4	Management Consultant (business owner)	Consultant - Global consulting firm	Political science and economics degree, Masters in Management
P5	Managing Director (SE50 Company)	Group Product Manager (NZSE 50 Company)	MBA
P6	CEO (Business Development)	In current role for approx. 10 years	Accounting Degree
P7	Company Director & Management Consultant (business owner)	Managing Director (Electricity company)	Engineering degree, Masters in Management
P8	Management Consultant (business owner)	Vice President - Global consulting firm	Mathematical Psychology degree, MBA, PhD
P9	CEO (Research organisation)	CEO	Management Degree, MBA
P10	Company Director & Manager - Executive Education (tertiary sector)	Senior Consultant (strategy and governance company)	Agricultural science degree, PhD in International Business
P11	Company director & Business owner (various)	Strategic Marketing Manager (Global consulting firm)	Management & marketing Degree
P12	Business advisor (Economic Development Agency)	National manager (Public sector organisation)	None
P13	CEO (Management Consultant company)	Global Strategy Manager (National agricultural Board)	Business Studies Degree
P14	Company Director (financial services company)	CEO (multi-national financial services)	Accounting Degree
P15	Deputy CEO (Health sector organisation)	In current/similar role for over 20 years	Social Policy Degree
P16	Business strategist (Business incubator)	Divisional Manager (Telecommunications company)	Finance degree, Masters in business related area
P17	Company Director (various)	CEO (multi-national financial services)	None
P18	Company Director (various)	NZ Manager (multi-national food company)	Biochemistry Degree, Masters

5.2 STRATEGY AS A HOLISTIC ENDEAVOUR

The purpose of this section is to introduce and discuss the first finding that emerged from this study. As was initially noted in Chapter 3, the fact that the analysis proceeded in tandem with the data collection meant that a theme quickly began to emerge in relation to how participants viewed the strategic management process. Their view, and therefore it can be argued their practice, was not aligned to the dominant strategic management paradigm with its primary focus on strategy formulation. Participants viewed strategy as a holistic endeavour with implementation being a core part of the strategic management process. During the data analysis phase this finding was confirmed and the following quotations are provided as they are representative of the sentiments expressed by participants. The full, anonymised data collected under the initial node 'formulation and implementation' is included in Appendix 4.

Strategy stops with an outcome. If you don't get the outcome it's not really a strategy. Strategy that can't be implemented isn't a strategy. (Prtcp17)

It ought to be relatively easy shouldn't it, to have a good strategy. It ought to be relatively easy to communicate to everyone you need to. But how do you get people to follow it? That's really the question . . . Executing it, is I think the key task and I do know this stuff, it's like repetitive activity. Continually talking to people about it and so on. (Prtcp13)

A lot of times people have said - what's your evaluation strategy? I have two questions - did it happen and did it work? I can remember in the late 80's early 90's when NZ was doing a lot of restructuring work and I'd say to our potential clients, we not only want to bid for the restructuring but for the implementation because just going in and talking to people and coming up with a new organisational chart is actually quite easy if you've done it a few times, but getting in with the people and making the structure work and modifying it when it needs modifying. I think that's a very different set of skills which might be different from strategy but the people who I admire and might call strategists are interested in the physical reality. Not just coming up with the best plan. (Prtcp2)

This was an important theme in the data as it meant that when participants were reflecting on their strategic management development, they were employing this wider view incorporating the practices they had developed to implement strategy. Therefore,

the first theme that was identified during data collection and preliminary analysis process, and was subsequently confirmed during the data analysis phase of the research, is:

Strategic management is seen as a holistic activity.

Participants view strategic management as a holistic process and strategy formulation and implementation were not seen as able to be performed credibly in isolation. This sentiment was reflected by a participant - 'doing strategy isn't the same thing as knowing strategy' (Prtcp17).

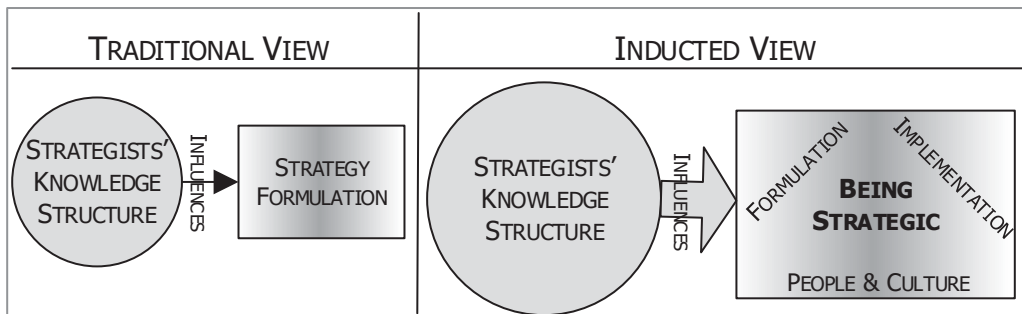
In many regards this theme, reflecting participants' view that strategy was holistic incorporating implementation and outcomes, moves strategic management from being an exercise predominantly in thinking to an exercise in thinking and doing. As was discussed in the literature review, the formulation-implementation split, a feature of the dominant strategic management paradigm, has been recognised and debated in the academic strategic management community for many years (e.g., Livingston, 1971; Mintzberg, 1998; Kachra & Schnietz, 2008). The formulation-implementation separation, as opposed to a more holistic view of strategic management, was encapsulated by a participant's use of the term 'being strategic' (Prtcp2).

I used to call it strategic planning, then I thought people think once they had done the plan they've done the thinking. So I started calling it strategic thinking and I realised people do the thinking but wouldn't change anything. So it's not a title that resonates with everyone, being strategic, but it's trying to get people to think is what I'm doing, this day, this week in what I'm being, actually connected to what I'm trying to achieve. (Prtcp2)

While it is recognised that, within the SAP perspective, strategic management is viewed as comprising of activities relating to both formulation and implementation, the majority of research, as observed by Leonardi (2009) in an adjacent field, is typically focused on either formulation or implementation. When participants reflected and discussed strategy and strategy practitioners, they were reflecting on this more holistic, arguably larger, concept than is encapsulated in the more traditional view of strategy. Therefore, the traditional view of strategy was seen as an inappropriate view for this research and, as

a result, an expanded model was inductively developed. This inducted view is contrasted with the traditional view of strategy in Figure 5.2.

Figure 5.2 – Refined model of a strategist’s knowledge structure.



Participants’ view of strategy as a holistic process meant that, in their eyes, in order to be an effective strategy practitioner, an individual required an expanded and more comprehensive knowledge structure. Importantly the focus shifted from the quite specific act of strategy formulation to the holistic concept of ‘being strategic’ (Prtcp2; Prtcp3).

The relative importance of tasks focused on formulation versus those centred on implementation was an interesting extension of this theme. Participants were generally of the view that strategy formulation was largely less important in the strategic management process than implementation.

I think that I’m an example of that, a pretty average strategy - let’s build a network and compete with Xyz. It’s about tactics, tactics really matter and execution really matters, the actual details of the strategy aren’t quite so important. (Prtcp5)

I’m not a big believer in strategic plans. I mean we do have a strategic plan, all organisations do but I don’t think being strategic is about setting a goal and working your way towards it like that because the world isn’t that linear and it isn’t that straight forward. It’s much more about reading signals and certainly thinking ahead and wanting to do the best in whatever it is you’re in. (Prtcp3)

I mean if the strategy is obvious why hasn’t it been executed and that’s something I can’t waste my time and get frustrated trying to help someone else develop a strategy and then watch it fall apart. (Prtcp18)

The holistic view of strategic management introduced two additional, related aspects from the data. Firstly, participants reflected that the practices required to be effective in both formulation and implementation were diverse and often difficult to obtain in single individuals. This aspect, which will be elaborated on in the discussion chapter, returns to the concept of strategy as a shared collection of practices (Barnes, 2001; Schatzki, 2001).

Having said that, the skills required to develop the proper strategy and the skills required to execute are very different. (Prtcp4)

I think it's almost dangerous to say the strategist, because I don't think, even in small businesses, you don't have a single strategist. I think it's dangerous to think that someone is going to provide you with all the answers. (Prtcp7)

I've seen very many clever people who just haven't been able to execute to save themselves. Whereas I've seen people who I would regard as not necessarily top drawer strategically but just have that sense of determination, resilience to get things done and generally it's because they have the ability to have high quality interactions with people. (Prtcp16)

Secondly, it is logical to assume that the implementation of any strategy that is not simply an extension of the *status quo*, will involve some form of organisational change. Evidence from the data highlighted the importance of organisational culture in the strategy process and indicated that participants viewed effective strategy practitioners as being able to be closely involved with the organisation in question. This is related to the concept of social embeddedness which reflects that individuals who are socially embedded in an organisation are impacted not solely by economic questions but that they are embedded in a network of social relations (Granovetter, 1985, 2005). Participants expressed a view that effective strategic management needs to be formulated and implemented by, and with, people in the organisation.

It's how you solve the problem and also it actually taught me the link between culture and strategy. So you just can't have a strategy without understanding the cultural change that goes with the strategy. (Prtcp14)

There are things that we did that fundamentally changed how people bought into the organisation... It doesn't mean a lot on its own but when you put it

one on top of another across an organisation in terms of how you execute and embed a strategy, all those things become important. That's that trust and confidence. (Prtcp18)

I think that leaders have to be visible, leaders have to engage, leaders have to inspire and I think the development of strategy has to be thought of in those terms rather than just being about things. It's about the people. It's about the approach of actually turning the strategic initiative into outcomes. (Prtcp16)

In summary, this finding, it must be noted, was not the primary focus of the research question posed but its overall impact on the research was significant. By incorporating participants' views of strategic management, their narratives, relating to their practice development, can be viewed in this wider context allowing them to 'make sense'.

5.3 SIMILAR DISSIMILAR PATHS

'... it doesn't matter which way you go,' said the Cat.

Lewis Carroll

The purpose of this section is to present the major findings of this study in relation to the research question of how strategy practitioners develop their practices. Riessman (2008) notes that how an analysis is presented is usually the choice of the researcher and for this research it was considered important that the narrative aspect of the data, the participant's voice, was preserved as it was within the narrative that the rich, deep insights were contained. Yet the thematic analysis conducted was equally important. Ultimately it was elected to adapt the presentation style of an exemplar of narrative research that was identified by Riessman (2008) - *The genesis of chronic illness: Narrative re-construction* (Williams, 1984). The data collection method employed by Williams (1984), involving semi-structured interviews with thirty people suffering from rheumatoid arthritis, was similar to the method used for this research. He then selected three cases which he used to illustrate different explanations for the genesis of arthritis. A more recent example of this approach is provided by Rouleau and Balogun (2011) who presented their findings from research into middle managers' sensemaking in the form of four vignettes. For this research it was elected to use one participant's narrative to

effectively narrate the key findings and analysis regarding the development of strategy practitioners, with other participants joining with their narratives as appropriate.

Therefore, to present the findings in this section, Bill (not his real name) has been employed as a quasi-guide, quasi-narrator in order to present the collective development journey of all the participants interviewed. Bill was selected because his career development journey was considered generally representative of the participants and, in addition, he was able to narrate his story clearly and with passion. In addition, other participants join the conversation where appropriate to demonstrate similarities or differences within the overall career development journey. In this way the richness of the narrative account is not lost within the analysis, while allowing the analysis to add depth to the discussion as different themes emerge and are presented.

Moving to the finding itself, the purposely oxymoronic title of this section hints at the finding.

Recognisable strategy practices are developed idiosyncratically

Participants' career paths, roles and positions, whilst idiosyncratic, allowed them to develop a seemingly similar, solid base of recognisable strategy practices.

The finding, and the focus of this research, relate to how strategy practitioners develop the strategy practices they employ and not the content of the strategy practices themselves. It is, therefore, important to note that it is not possible to identify the actual strategy practices participants employed from the data collected, or to assess the commonality of these practices among participants as this was not the focus of the research. It is, however, possible to suggest that participants share a similar set of strategy practices as they have been recognised by a peer as effective strategy practitioners. As has been argued, strategy practitioners become visible during episodes of strategy praxis and, therefore, participants, in all likelihood, share a range of recognisable strategy practices allowing them to be identified as strategy practitioners.

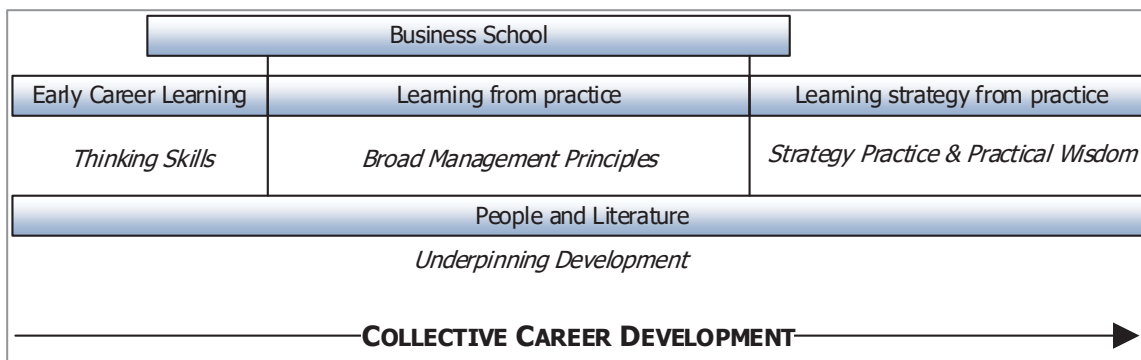
In addition, throughout the interviews, strategy and strategic management were discussed as though they were relatively well defined subjects. As the literature revealed, there is not an agreed definition of strategic management. Consequently it was not appropriate to try and define the topic at the start of the interview. Even if there was an agreed definition, the purpose of the interviews was to allow participants to reflect and narrate their own stories, and employing a definition up front would potentially place

artificial restrictions on the participants' own conception of strategic management. Participants did not, however, express confusion over their conception of strategy, or seek to define or clarify the area. The following was typical of how the interviews commenced – 'Strategy. It all started, my background was a techo . . .' (Prtcp5).

Why is this an important point? As will be shown, its importance lies in the fact that, despite the idiosyncratic careers and experiences of participants, they have all developed a set of recognisable strategy practices.

When the data was recoded using a career development perspective, the collective journey that participants experienced when developing their strategy practices emerged. At the top level of the analysis there were five main categories; early career learning, learning from practice, learning strategy from practice, business school, people and literature. These have been developed into Figure 5.3 that demonstrates the generic stages that participants went through during their collective career development.

Figure 5.3 – Aspects of participants' collective career development.

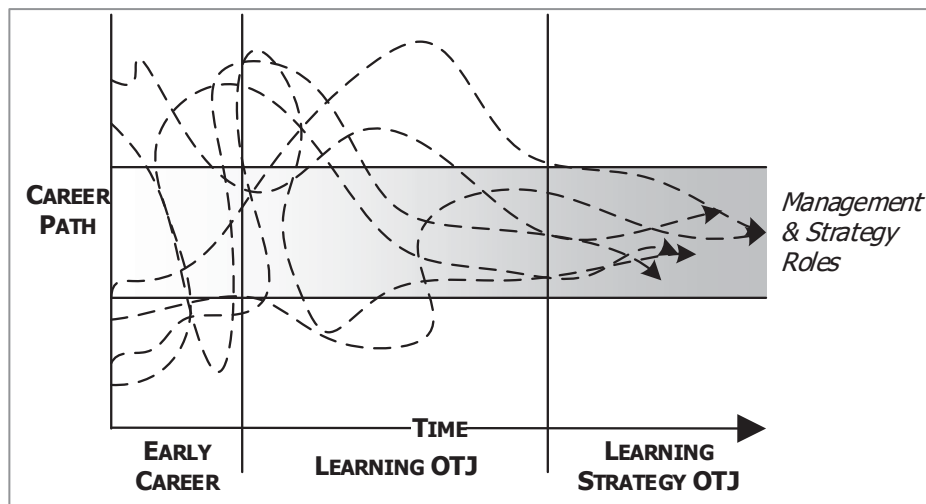


A few points of clarification need to be made before Bill commences his role as narrator for this section. The term *learning* is employed rather than *education* which is more typically associated with 'formal learning' (Eraut, 2000) as provided by universities. *Learning* in this context refers to the knowledge or skill acquired through a learning process (Eraut, 2000). Therefore, early career learning in Figure 5.3 refers to both university education as well as lessons learnt in the workforce. 'Learning from practice' covers the period in participants' careers where broad management principles were learnt through positions and roles that were usually, although not always, primarily non-strategic in nature. For example, one participant spent a large period of time in the information technology area learning, in his words, how to engage with people to deliver

successful projects. 'Learning strategy through practice' is self-explanatory and it is in this period that participants reflected that they learnt strategy practices. Business schools featured in the development of a number of participants though interestingly, they viewed business school impact on their career development as being relatively minor. The final theme is concerned with the people and the literature underpinning participants' development journey.

While Figure 5.3 was developed to assist in presenting this finding, its neatness and order risks making the collective career development paths of participants appear relatively tidy and uniform. The following stylistic representation, depicted in Figure 5.4, was developed to provide a better sense of what the actual career paths of participants resembled. The figure's purpose is solely to help reinforce the concept that participants had idiosyncratic career paths in the development of recognisable strategic management practices. This aspect will be illustrated and discussed in greater depth.

Figure 5.4 – The idiosyncratic careers of participant's.



A final, but important, point to reinforce is that the narratives presented are necessarily co-authored. The interview process, as Williams (1984) observes, is itself a particularly clear case of co-authorship. However, having recognised this, Bill's narrative is his own reflected story and this is the same for all participants. They are all Bill's words but, by necessity to make the narrative flow in a written format, the narrative has been sequenced to allow the reader to engage with it as a coherent whole. In addition, and in line with both Williams (1984) and Kvale & Brinkmann (2009), the quoted speech has been cleaned up to some degree and the spoken disfluencies, interruptions, interviewer utterances together with the blood curdling yells and raucous laughter from café staff

and nearby patrons, young and old, have been removed. The sole purpose for this was to transform messy spoken language as transcribed into a more easily readable format (Riessman, 2008) taking care not to impinge on meaning.

5.3.1 EARLY CAREER LEARNING

This section focuses on the early career learning of participants. Bill's early career appeared to be as far away as possible from what might be expected to be the origins of a strategy practitioner.

Came out here in 1979 and the quickest way to earn money was driving buses, you got paid huge money back then. . . I changed jobs a number of times, went to being materials engineer for Xyz City Council, which I loved doing but I became a drainage and earth moving specialist. In other words I was a digger driver and truck driver in Xyz. Part owned a drainage and earth moving business but I learnt an enormous amount in 18 months and of all the things in life I was irrationally proud of, being a stunningly good drain layer and a very good digger driver, I'm still chuffed with it. And I can still do it cause every so often I do gigs for people and lay their drains.

These experiences were not seen as unimportant in Bill's overall career and his early 'hands on' experiences in business were clearly looked on with fondness. Phrases such as, 'I loved doing', 'I learnt an enormous amount' and 'proud' demonstrate that Bill reflected on these experiences as being a valuable part of his development. This is also of interest because, although Bill had obtained a civil engineering degree before he came to New Zealand, it was not a time or experience he spent much time reflecting on during the interview. The only time it was mentioned was in passing as part of his overall background and even then, he seemed to place more significance on his time driving buses.

I'd qualified as a civil engineer in the UK and then drove buses to get enough money to come out here. A double-decker bus driver between Greenock and Glasgow, it was brilliant.

This may be due to the fact that he completed his degree a relatively long time ago and so its importance, given his ultimate career, has lessened but that is difficult to balance with his fond recollection of his time driving a double decker bus or with the fact that he used his civil engineering degree in early career roles. It is important to remember, and

restate, that it is the participant’s reflection and meaning that is important and this was facilitated by allowing time and ‘space’ for reflections to naturally surface during the interviews.

The majority of participants credited their early career learning experiences as foundational in their career development. This, in itself, is unsurprising as it is to be expected that early career learning experiences would play an important part in an individual’s practice development. In medicine, for example, a general practitioner will be heavily influenced by his or her medical training. The surprising aspect was that participants did not remotely share a common development path in terms of content as would be common in professions such as law or medicine. The foundational learning that participants cited as being important, which is detailed in Table 5.2, came from a wide variety of disciplines primarily unconnected with management or strategic management.

Table 5.2 – Sources of foundational education.

#	Foundational Learning (University degree unless stated)
1	Civil Engineering
2	Political science
3	Geography
4	Political science and accounting
5	Work experience - technician
6	Work experience - consultancy
7	Electrical engineering
8	Botany
9	Agricultural science
10	Management and marketing
11	Political science and accounting
12	Business studies
13	Work experience – insurance and self-employment
14	Social work
15	Work experience - technician
16	Work experience – computer programming
17	Mathematical psychology
18	Plant biochemistry

The eclectic sources of early career learning from education and work experience indicate that participants gained more generic skills that they were then able to apply as their career progressed. This view was generally reflected by participants.

University just gave me the opportunity to delve in different areas, I don't think it shaped a lot of the business side. I can go into any type of business now where there is metal or IT or whatever and you've got a style of thinking so you can break it down to first principles. (Prtcp18)

I think that's partly what being strategic is. It's about being able to look at things from different aspects and being able to link up things that aren't always put together because of that. I think that geography does give you quite a good basis for doing that, not that I would have thought that when I was taking the degree, but in reflection. (Prtcp3)

Importantly, not only did participants credit their early career learning with providing foundational skills, they were able to reflect how these experiences, seemingly unrelated to strategic management, played a part in forming their strategic management practices. Bill mused on this point during the interview.

It would be interesting also to check, to go back through the original career choices of the participants, because I did engineering, it was quite an analytical place to start. So I did learn to think about foundations and about structures and about is the structure fit for purpose, will it support the weight you're going to place on it? Doesn't matter whether you think about physical structures or philosophical structures you still have to do the same test, are the foundations adequate and is the structure going to support the weight. Even simple basic tests like that make a difference. There's nothing wise about that, it's just common sense.

Bill's view was supported by other participants.

Aspects of social work are around systems thinking so I was attracted to systems thinking and systems thinking is a good place for strategy development. (Prtcp14)

I guess an engineering degree gives you an element of systems anyway, particularly an electrical degree where you are doing control theory and

feedback loops and all those sort of things. Designing a project is a bit like designing a business plan, you've got to start with what you want to achieve at the end and work through a series of logical steps to plan it, organise it and do it. The disciplines are not dissimilar. (Prtcp7)

To complete this aspect, it was interesting to note that when the university education undertaken was in a traditional business field, the reflection was that the benefit was more generic than specific to management or strategy.

Doing the BBS [Bachelor of Business Studies] in terms of giving me frameworks for strategic thinking, was it valuable? It was valuable in terms of giving me a questioning mind and I think it was valuable in giving me the confidence that actually I could learn and pick up stuff that I didn't know before and give stuff a go. I think it gives you to a degree the disciplines to be able to train your mind to be able to apply. That's what it gave me as opposed to anything specifically around strategy. If I'm honest. (Prtcp12)

5.3.2 LEARNING FROM PRACTICE

This section moves to the next chronological step in the collective career development path, learning from practice. Participants' experiences and roles, in a similar vein to their early career learning origins, were eclectic. Bill had a number of different roles as his career progressed and he began to move into more traditional management roles.

I had notional control of the works department. Notional because the works superintendent was older and wiser and a great deal more forceful than me. Even then he had to come through me to get to the city engineer on any formal stuff. So I was involved quite a lot in the political end of trying to get balance as I said. We also had a complete disaster where there were various rumours of financial misdealing with some of the reasonably senior council staff. The work's superintendent got so stressed about the fact he couldn't change some of these things that he committed suicide. I suddenly landed in the thick of all that as well cause I was president of the union for the district. I suppose a lot of learning to step back from things and take a detached view of what really had happened as much as I could. Back then there was no word processing so I hand wrote everything and I've got no copies of the letters I wrote to the council, to the chief engineer, to the national president of the union. It was pretty intense, I'd forgotten all about that as well.

I transferred to be relations manager for what became Xyz. So I changed career twice significantly and that was probably the first time that I got exposed to any level of strategic thinking at a formal level. I became relations manager, so I went from an engineer in a very structured works department to the person who ran industrial relations, public relations and human relations for an electricity company. That was one of life's defining moments for me because the guy I met, that I worked for a number of years [name removed] made a commitment to me when I joined that he would support my career development and no one else had ever even used words like career development.

The roles, as Bill observed, allowed him to gain valuable skills through various aspects of organisational operations and management. Bill often discussed these roles with genuine excitement and it was clear that the opportunity to be exposed to new thinking and influential people, a point that is returned to, allowed him to grow and develop his knowledge and practices. Life circumstances, as they often do, played a part in determining Bill's career moves.

I then got seconded to Xyz in the UK as an associate partner. My father was crook at the time (...) [name removed], who had transformed my life back in the early days, he was running a joint venture with Xyz Consulting and he said I'll find you a job in the UK and he did. Transferred to Xyz UK and set up the energy sector for them and that was I think one of the early cases where I could start with almost a blank sheet of paper and say what are we trying to achieve in the next 12-18 months, what's the long term win look like, what must we do in order to achieve that. We must have got something right because we went from pretty well a standing start to 12 million pounds after 18 months, which is quite big.

That is still big today! This part of Bill's career allowed him to practise strategy although it is interesting to consider whether he saw it in traditional strategic management terms. 'What's the long term look like', 'what are we trying to achieve' and 'what must we do in order to achieve that' are phrases identifiable with terms used in strategic management. It is considered likely that participants will apply labels such as strategy or strategic management to past actions and activities that they may not have seen in that light early in their careers. By way of analogy, if they learnt to play a game of cards as a child that

they subsequently found out was called Euchre, then they may reflect that they played Euchre as a child.

It was apparent that Bill learnt a wide a range of skills and practices from the various roles he had early in his career. These skills and practices can be seen to be valuable when strategic management is viewed as holistic. To implement a strategy and deliver outcomes requires a wider array of practices than those required just to formulate a strategy. This aspect, learning a wide range of skills from practice, was reflected by all participants. Indeed some of the lessons learnt were clearly formative in the participants' career development.

Selling insurance would have to be the hardest bloody thing to do in the world I reckon. That's where you really did require courage and I learnt a lot about, the courage needed to be successful, I think. The willingness to persevere when everything in your gut was telling you to flee, all that sort of stuff. I learnt a lot about straight out courage but I also learned in that process the importance of planning because actually that was your security. Having a clear objective to start off with and then planning how you were going to do that and working your plan was the thing for me that allowed me to overcome my courage, my fear. (Prtcp13)

Worked with a pretty good team in insolvency and really cut my teeth there for three years back when receiverships were the way to do things so we did a number of receiverships. So it was really, good interesting work and really saw the inner workings of business, debtors, creditors and how to realise assets and things like that. It was also kind of sobering as well, laying off staff, big numbers too not little numbers. (Prtcp6)

In parallel with the previous section that focused on early career learning, the diversity of roles, many of which were unconnected with management and strategy, was striking. The majority of participants did not have linear careers that saw them progress smoothly within an organisation, or organisations, as they enhanced their strategic management practice. The eclectic nature of the experiences that participants noted as influential is demonstrated by the following examples: running a bus tour company in Europe in the 1960s; owning an earth moving and drainage business; teaching English to the Greek military; delivering training courses for financial planners; being a Treaty of Waitangi negotiator; running a food research and development plant; running a micro-computer

company; researcher within the department of social welfare; and, running an executive toy building company from a garage.

This section highlights the diverse career paths of participants. Yet at the same time all participants were building a foundational portfolio of skills, abilities and knowledge, in other words practices. It is worth recalling that all participants were ultimately recognised as being skilled strategy practitioners although at this point in their individual careers it is not obvious that this would eventually be the case.

5.3.3 BUSINESS SCHOOL

This section presents the impact that business schools had on the career development of participants. Not all participants had direct exposure to business schools via undergraduate, postgraduate or executive education courses. Table 5.3 documents participants' direct interactions with business schools and approximately when this occurred in their careers. There is no obvious pattern to participants' involvement with business schools.

Table 5.3 – Participant involvement with business school.

#	Business School	Career Point	Type
1	Massey	Mid-career	MBA
4	Kellogg	Early-career	Masters
5	Not stated Stanford	Mid-career Mid-late career	MBA Executive course
7	Not stated	Early-career	Undergrad
8	Canterbury/Sydney	Early-career	MBA
9	Auckland	Early-career	PhD
10	Not stated	Early-career	Undergrad
12	Massey Wharton	Early-career Mid-career	Undergrad Executive course
13	Not stated	Early-career	Undergrad
14	Massey	Mid-career	MBA
15	Not stated	Early-career	Masters
17	AGSM/Sydney	Early-career	MBA
2, 3, 6, 11, 16, 18	None	n/a	n/a

With regard to his involvement with business schools, Bill expressed that the lessons learnt, in his case on a MBA programme, were valuable, although his position changes somewhat as the interview progressed.

Did the MBA and again that was another genuine life changer for me because I met so many amazing people, many of whom are still friends today quarter of a century later. [Named city] back in 19XX was a pretty dull place and to have a group of 26 really challenging aggressive fairly young people coming together once a fortnight. It was just the most brilliant hothouse of thinking. I learnt, I guess, to validate what I'd already got, but I also learnt a lot more about myself, many lessons that I have to re-learn on a regular basis, some of which I'm still re-learning now.

Through the interview, Bill's view of the impact the MBA had on him directly altered.

The MBA gave me some of it, it gave me validation and that was one of the key things, that what I had learnt actually did all fit into a framework. ... That's when I realised that I already knew an awful lot of these things cause. . . That was why I was intrigued by your question as to where did the genesis really start and it's such a gradual progression that I can't honestly say where things happened. But all I know when I did the MBA and we started to look at formal strategic frameworks and the different models you can use to help strategic thought, which were pretty rudimentary, SWOT and PESTE analysis was pushing the boundaries back then, that I realised that I actually knew an awful lot of that stuff and a lot of the questions that I still ask today, what does winning look like? What success looks like? Were questions that I asked I guess relatively intuitively early on in life.

Bill clearly felt his experience on the MBA was beneficial although it appears the value was not in developing specific practices, which he indicates he felt he had already learnt. It was rather the interaction with other participants on the course and having the opportunity to learn more about himself that appears to have been where he saw value.

In general, participants who had been exposed to business schools reflected similar sentiments to Bill and did not feel the experience contributed significantly to their strategic management development. This opinion was held despite the perceived status and quality of the institution participants had attended; Stanford (2nd), Kellogg (13th),

New South Wales (48th), Massey or Sydney (2013 global MBA rankings in brackets where applicable, Financial Times, 2013).

I did very much like an MBA course when I went back for my Masters of Management at Kellogg. That was a waste of 2 years, I didn't learn... I mean everything I did in my undergrad, I pretty much repeated for my Masters of Management. (Prtcp4)

*So that [Stanford] kind of reinforced this it's all about people. But we had a guy, Pfeffer, may not have been quite a noble laureate. So this is it, I'll learn the leading edge shit about strategy and what he was talking about was trusting your gut. That was really interesting. I think, ****, I've paid all these dollars and come all this way to have some guy tell me just trust your gut. (Prtcp5)*

While participants did not credit their business school experience with contributing significantly to their overall practice, they did note, like Bill, that there were other benefits in areas such as network development or confidence.

The thing about the MBA, it gave me the confidence to attack any business problem. (Prtcp5)

For me [Wharton] was confidence and networks. I occasionally go back and refer to the books but the more is, in Maori it's called 'ngako', it's the guts. What's the real context of it, what's the real thing and that's what it gave me, confidence. (Prtcp12)

It is of interest that participants who had not attended business school did not express that this was a part of their development that they felt was missing. They reflected that the experiences they had gained in their careers were perceived as, at least, equivalent in terms of value.

I didn't go off to do the advanced management programme at Harvard or things of that nature because I was just too damn busy. Then suddenly you become a CEO there's not time to go off and do those things. I have to say though, I've had a lot of interactions. I've been involved in things like the [names removed], various industry groups and the like. On the boards of things like [names removed] and so you get, you have some great discussions

with people from different parts of the world. (...) so I had a lot of informal interactions that exposed me to a lot of different ideas from different people. (Prtcp16)

5.3.4 LEARNING STRATEGY FROM PRACTICE

This section explores how participants developed their strategy practices through strategic management roles. Learning strategy through practice was a strong feature of the career development paths of participants and Bill closely reflected the general view of participants that it was when he was able to practise strategy that he started to learn valuable strategic management lessons.

I got a phone call from the CEO of the new entity and he rang me and said - right put your money where your mouth is, I need a General Manager Strategy for the next six months and I can't afford to pay your fees so I did it at effectively half my normal fee and learnt an enormous amount about national economic development strategy from the point of view of the people who had to implement it and it was just brilliant. If you want a crash course in what's truly important in terms of strategy and the implementation of it, getting a job like that was just a godsend because I learnt an enormous amount. So for the next seven years I owned that account and that grew into doing all the primary sector stuff because it was largely funded by trade and enterprise in the early days.

It was an interesting assignment because they wanted a world class programme manager and I said to the partner who was taking me down to talk to them, I don't even know what programme management is and he said yes you do, you've done it all your life you just didn't call it programme management. Which is again a really useful lesson, don't get carried away by titles, think about what it means. I got seconded into Xyz as the world class programme manager for this start up retail company (...) Again an enormously interesting planning process because they went from challenging a bunch of accepted ideas as a programme manager to melding it into a really interesting business with a business model that is only now starting to be replicated by others in the sector. So we were twelve to thirteen years ahead of our time. Which is just as bad as any other reason for getting something wrong, way ahead of your time you're still wrong.

Bill, when narrating stories of strategy roles he had undertaken, strongly associated implementation as part of the strategy process, reflecting the first finding that strategy is a holistic endeavour. The language he employed convincingly reflected this view: 'there may be a role for a strategist who doesn't care about implementation but I don't think that's professionally and socially responsible.' Although it is not able to be determined from the data, it can be speculated that the strength of language used suggests Bill may have encountered situations in practice where strategy was focused on the traditional planning and formulating aspects. Bill used the phrase, 'Taking grandiose strategies and turning them into doable things' implying that 'grandiose strategies' were a problem that needed to be solved.

Learning strategy through on-the-job experience was credited with being a core part of practice development for all participants. This is naturally to be expected but it becomes of greater significance when contrasted to the value participants placed on learning from business schools which was discussed in the previous section. Participants stressed the value of being involved in strategy praxis and how this contributed to their development.

I think it's actually doing it. It's a discipline you learn more by doing than reading. (Prtcp7)

I think probably the critical thing for me was the move from business school into [strategy] consulting. I thought I'd go there for a year, it had never taken me more than a year to learn a new discipline, get to the boundary of it. So I thought I'd spend a year I'll learn this stuff and I'll go back run my own business. Ten years later I was still learning. (Prtcp17)

I ended up heading the strategy group in Wellington. It was just, what's the next problem but making sure you stayed with some straight forward principles in terms of what are you really trying to achieve and testing and testing and testing and challenging as politely as possible. Providing you have the frame of reference right and unanimity around what we are really trying to achieve and how we are going to measure that. (Prtcp9)

Strategic management episodes did not have to be successful and participants commented on unsuccessful efforts as being valuable for learning.

Burning your fingers a few times without losing them. (Prtcp16)

And that means you think harder about your decisions because you know that someone is going to be watching the results because they are measurable and that has a little bit to do with it as well. So there are those deep foundational things and they terrify me because I'm exposing myself to failure. And I've been involved with some of the biggest cock-ups that have ever happened. I've really learnt some interesting stuff. (Prtcp15)

5.3.5 LEARNING FROM PEOPLE AND LITERATURE

This section presents the theme that underpinned participants' collective journeys and reflections of learning from people and literature (employed in a broad sense in relation to written work) which came throughout their careers. Bill, in particular, spoke warmly when reflecting on the lessons he was able to learn from key people throughout his career. It was a clear theme echoed by other participants that being able to be around 'bloody good people' (Prtcp2) was hugely beneficial in their development. Bill pinpointed a range of individuals who clearly made a significant, positive and lasting impression.

Again I got exposed to a lot of very, very clever people who were just extraordinarily strategic brains. Xyz was the MD. (...) He and [name removed], and between the two of them I learnt an enormous amount about understanding what the question is that you're truly trying to solve and they were both incredibly good at that. As an engineer I always knew you measured twice, you cut it once but they took that to a whole new level from that. The other big influence back in the Xyz days was a guy called [name removed] who was an independent director on the local board and he was another of these people who always asked why. He just pushed and prodded and challenged and he constantly came up with little snippets that made me laugh but I remembered them. One of them was never confuse motion with progress, he regularly accused me of being as busy as a dog trying to bury a bone on a marble floor, huge appearance of industry but no chance of success.

While it is again unsurprising that people would have a significant influence on the development of participants, the strength of the reflections was revealing in the context of what participants saw as influential in their practice development. The influence people had in the development of participants came in a wide range of situations and participants were able to identify particular individuals who had a large impact.

He supervised my Masters and he took me to another level again and to me that was the real game breaker. It was excruciating and it hurt and I'd go home and I'd be in tears of total frustration thinking why don't I get it. (Prtcp9)

All the way through, right from being very young, there would be a handful of people that I've always picked stuff up from. I've quite a strong mentoring network and I don't think that's formal in anyway. (Prtcp6)

Meeting people like that and understanding the way they think or trying to understand the way they think because they operate on such a high plain I think taught me more about strategy than any book. (Prtcp15)

It is of interest to note that, in the vast majority of relationships where participants identified individuals who were formative in their careers, they did not consider them to be formal mentoring relationships. The experience was primarily through working for, and alongside, these individuals.

We had a formal mentoring structure which I hardly ever drew on, might be about strong introversion. I might just have been inclined to resolve things on my own. I would say (...) I recognise mentors, senior people reaching down and offering advice and sharing their experience, very important. Does not have to happen in that really intense - I'm your mentor, you're my protégé' - sort of way. I had light mentorship, I got advice and help from lots of different people. (Prtcp4)

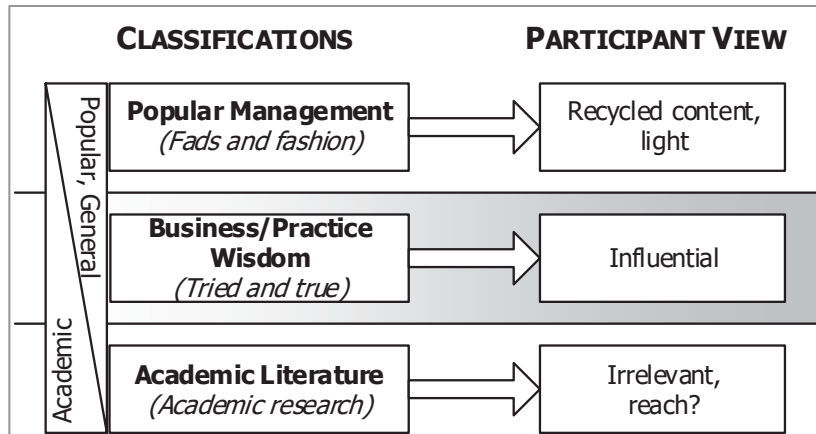
I always find it quite funny when people say, he/she is my mentor and I think that is quite a big label to use, like Obi wan Kenobi. (Prtcp6)

In my career I've always thought of having three people identified as mentors. One of them perhaps, the other two we never sat down and said you're my mentor. (Prtcp2)

Turning to the aspect of literature, participants identified that information they received via sources such as books and magazines contributed to their development throughout their careers. It is possible to group these sources into three broad classifications which are displayed in Figure 5.5. In academic literature it is more common to split literature into two groups; popular management and academic literature. Through the analysis

process it was clear that participants recognised a third category could be identified which has been labelled in the figure 'Business/Practice Wisdom'.

Figure 5.5 – Three classifications of management information.



Previous research, as examined in the literature review, indicated that academic literature had little direct impact on practitioners (Gopinath & Hoffman, 1995; Kieser et al., 2015). Evidence, or more accurately the lack of supporting evidence, from the interview data supported this view with participants noting little, if any, benefit directly from academic literature. The majority of participants did not mention academic literature, either positively or negatively, and this may indicate, in line with Gopinath and Hoffman (1995), that this literature is simply not read by participants. There was some comment in regard to scholarly journals and one participant, with extensive experience in the academic world noted, 'It is mostly about thinking as opposed to how much crap you read. You could read a gazillion books, research papers on strategy and every journal article on strategy ever written and still not get it' (Prtcp9).

Participants were equally ambivalent about the majority of information available from popular management sources and they appeared to demonstrate little enthusiasm for this as a source of practice development. Those who did reflect on the available strategy literature were aligned with the view that current literature tends to focus on the latest trends (fads and fashions) ignoring the solid foundational lessons developed over the years. Mintzberg et al. (1998a) note succinctly that the focus is on, 'the trivial new instead of the significant old' (p. 8).

Nowadays I read the new management book and you go, oh yeah I remember this one. It's just different phrases for the same concepts. (Prtcp4)

I remember going for a job interview in my late twenties and somebody said, so who are the gurus that you follow? Thinking I'd trot out Drucker and Mintzberg or whoever. I remember responding, thinking that this is the wrong answer, that I didn't really have a guru or several gurus. (Prtcp2)

Whilst participants showed little interest in the current academic literature and the majority of popular management, the analysis revealed that they did utilise literature and information from sources they trusted. This information is referred to as business/practice wisdom in Figure 5.5. These are the books, publications and sources of information that, for participants, appear to have withstood the test of time and have helped develop their practices and thinking processes.

All the new stuff, post early 1990s, pretty much useless. It was specialised articles about obscure little things in obscure little countries. All the foundational stuff was written in the 70s and 80s that laid out the field and how to do it which was still where a lot of the value was. (Prtcp17)

You need to be current and you also need to know what's the good juice which has been around for many years. (Prtcp12)

There was no text that got me hooked on strategy but there were a series of articles that got me hooked, predominantly HBR. You can go back to 1974 seminal article on the art of the strategic leader who illustrated to me three core components: conceptual, technical and people and I think he got it right back in 1974. (Prtcp14)

Significantly this area, business/practice wisdom, appears to emanate out of both academic and practitioner spheres. Authors considered important by participants included Stephen Covey, Gary Hamel and Jim Collins. These writers have strong links with academia, yet some of their best known publications are those primarily written for non-academic audiences, for example, *Built to Last*. Other authors mentioned are clearly associated with non-academic activities; Ricardo Semler (CEO of Semco); Sun Tzu (Chinese military authority); and, Max de Pree (founder of Herman Miller office Furniture Company). A participant provided an interesting reflection on how they considered knowledge moved between practice and academia.

Leading consultancy companies get asked to solve the most difficult questions by the biggest companies in the world, ones they can't work out with all their resources including their internal strategists. So they solve those problems and then go to meetings, strip out all the client information and share that learning with their colleagues. When I was a full timer I had six offshore meetings a year for sharing learning. That then gets fed out to the clients who apply it, academics come along, discover it and write it up in text books. (Prtcp17)

Finally, and aligned to the concept of business wisdom, a common theme in the literature sphere was that participants read biographies of people and companies. This literature would appear to emanate from popular management as well as publishing focused on general interest. In some regards this theme can be seen simply as an extension of learning from people and learning from practice.

I enjoy books on corporate failure. I love looking, you kind of learn stuff from that. HIH that crashed and burned badly and it was really the CEO so I read a lot of that kind of stuff and I get more insights out of that rather than the success stories. (Prtcp5)

I'm a sponge. But what I tend to read are autobiographies and that comes back to what it is people are thinking about. (Prtcp9)

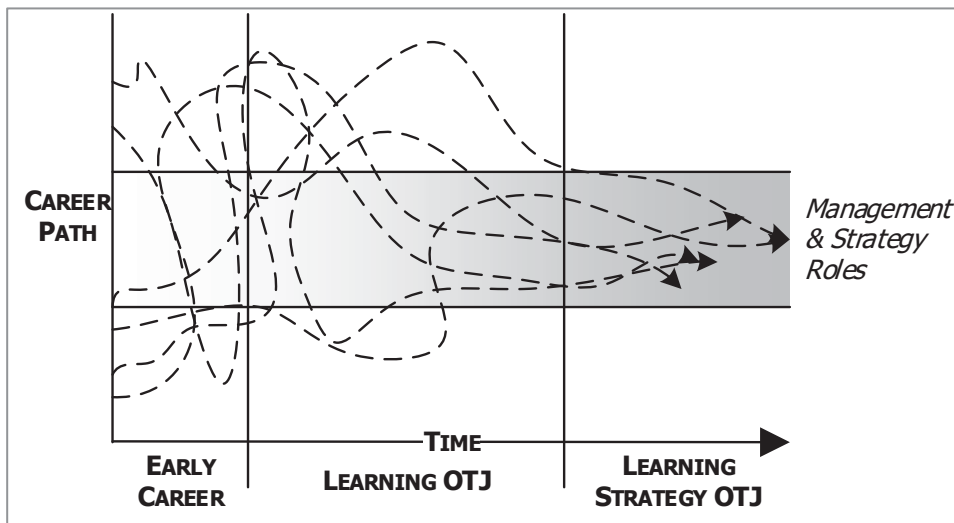
I've read about a lot of the great business people, whether it be Julius Pierpont-Morgan or an Edison, the Wright brothers. A broad range of biographies and historical business as well as being a big recreational reader too. I do a lot of reading. (Prtcp16)

5.4 SUMMARY

This chapter has presented the findings from this research. The first finding which initially emerged during the data collection process was that strategic management is seen as a holistic activity. Participants view strategic management as a holistic process and strategy formulation and implementation were not seen as able to be performed credibly in isolation from one another. This was an important theme as it meant that, when participants were reflecting on their strategic management development, they were employing this wider view incorporating the practices they had developed to implement strategy.

The second finding, and the core area on which the research was focused, was that participants' recognisable strategy practices are developed idiosyncratically. While participants' career paths were idiosyncratic in terms of their roles and experiences, they all developed a suite of strategy practices able to be recognised by peers. Participants' career paths are, therefore, aptly illustrated in the stylistic Figure 5.6.

Figure 5.6 – The idiosyncratic careers of participant's.



The learning participants experienced through their early careers was foundational and provided them with skills and practices that were foundational in the development of strategy practices. It was, however, involvement in episodes of strategic management and strategy praxis that significantly shaped their strategic management views and practice.

Business schools did not have a direct, significant impact on the practice development of participants. Participants who had exposure to business schools through MBAs and executive courses reflected that the major value was in the areas of confidence and networks as opposed to the development of specific strategic management skills and practices.

Finally, the opportunity to work with and learn from a wide range of people was influential throughout participants' careers. This was not through formal mentoring arrangements, but by working alongside, and for, 'bloody good people' (Prtcp2) and was a significant source of practice development. While scholarly publications and popular management sources were not generally viewed as significant, a selection of information

and sources that provided participants with 'practice/business wisdom' was observed and these were found to have come from both academic and scholarly sources.

It is timely to remember Alice, who was last seen at the start of this thesis talking to the Cheshire Cat. Alice was used to raise the analogous question of how she arrived at this point and what practices she may have been bestowed with that would allow her to make choices about where she was heading. It is interesting to consider, in this analogy, who is the strategy practitioner in this episode of praxis. Alice has all the 'skin in the game', she represents the organisation, but she is asking the Cheshire Cat for advice – 'which way should I go?' and neither seem overly concerned about implementation, what it will take for Alice to get somewhere. It appears, therefore, that neither Alice nor the Cheshire Cat represent strategy practitioners using the findings from this research. The Cheshire Cat however, has all the makings of an excellent consultant and we remain in the dark about Alice's history.

CHAPTER 6 - DISCUSSION

'Well, in our country,' said Alice, still panting a little, 'you'd generally get to somewhere else – if you ran fast for a long time as we've been doing.'

Lewis Carroll

The purpose of this chapter is to discuss how the findings contribute to the current research conversation on SAP. The specific perspective, resulting from the research question, is the development of strategy practitioners. The discussion commences by briefly reviewing the research process undertaken so far and then describes the order in which critical outputs from this research are to be discussed.

The strategic management literature relating to the initial research focus, the practice development of strategy practitioners, was reviewed in Chapter 2 allowing specific research questions to be established. A research design was developed in Chapter 3 to answer these questions in conjunction with the establishment of the broader methodological foundation (philosophy of knowledge). Chapter 3 also identified a method that best suited resolving the research questions and broader methodological aspects of the research. Chapter 4 described how the method was then applied, resulting in the collection of rich, deep data from strategy practitioners. The data analysis commenced in parallel with the data collection process and this ultimately allowed the deeper meaning participants ascribed to their experience to emerge. The findings from the research were presented in Chapter 5 and this chapter, most importantly, discusses what the study has found to answer Booth, Colomb, and Williams' (2008) key question: so what?

It is important to first explain the order in which the findings from this study are discussed. In this thesis they are not in the order that would normally be expected, that is starting with the findings that directly relate to the research questions and then expanding the discussion from that point. As has been observed in the Findings chapter, when participants reflected upon and discussed strategic management, they were reflecting on a holistic, arguably larger, concept than is typically encapsulated in the more traditional (say academic) view of strategic management. Therefore, in order to make sense of the findings in relation to the development of strategy practitioners, the participants' view of strategic management as a holistic endeavour needs to be discussed

first. This is because what participants viewed as strategic management directly impacted on what they believed were the practices required to be an effective strategy practitioner. Only then did this, in turn, impact on the experiences and events that they considered to be influential in their own development as strategy practitioners.

The findings will, therefore, be discussed in three areas. The first area, Section 6.1, is in relation to how strategy practitioners view strategy and strategic management, what has been termed the 'informed view'. Section 6.2 then examines the main research question that this study sought to answer: how strategy practitioners develop their practices. The third area addressed is in relation to the impact that business schools have on practitioner development, and this final topic will be discussed in Section 6.3.

6.1 STRATEGIC MANAGEMENT – THE INFORMED VIEW

'The people who I admire and might call strategists are interested in the physical reality. Not just coming up with the best plan.'

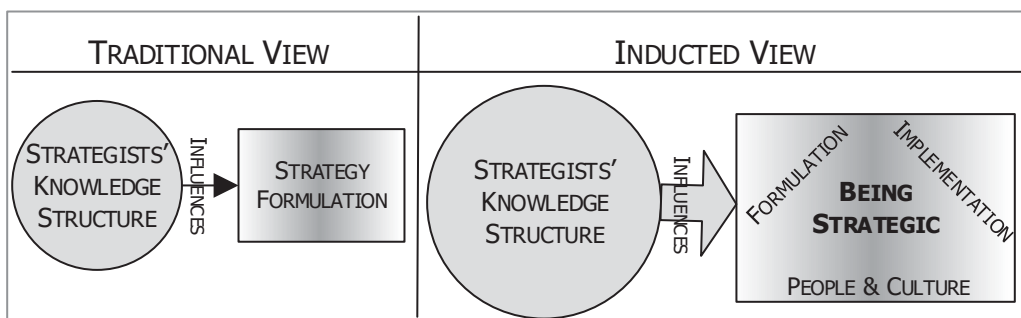
(Prtcp2)

The first area discussed is what the strategy practitioners interviewed in this study considered to be strategic management. This aspect has been termed, 'the informed view' as it is a view of strategic management from the perspective of strategy practitioners. As such it contributes to the SAP goal of understanding what it means to be a strategist (Dameron & Torset, 2014) and how strategy practitioners view the concept of strategy (Paroutis & Heracleous, 2013). The informed view that emerges from the study provides an alternative perspective to the dominant academic logic of strategic management (e.g., Nag et al., 2007; Nerur et al., 2008) that emerged from the review of literature in Chapter 2.

At the commencement of the data collection phase of the research, given that the literature review revealed the existence of a dominant strategy paradigm, it was considered that participants' views of strategic management would be closely aligned with the academic view – given that this view ought to have emerged from the research of practitioners - and that this would be reflected in their professional development. However, as has been identified, participants' views differed and they considered strategic management to be a more holistic endeavour with formulation, implementation, people and organisational culture all of importance. This latter view of strategic

management brings in a broad array of practices and skills that would not typically be associated with the traditional view of strategic management, such as change management, motivation, communication, project planning and the impact of organisational culture. The result of this finding was to enlarge the strategy practitioner's knowledge structure within this study from a narrower range of practices focused on strategy formulation to a broader range of practices focused on strategic management in general. This expansion is depicted in Figure 6.1.

Figure 6.1 – Refined model of a strategist's knowledge structure



'I popped out the end of my MBA, it completely transformed my view of the world. I discovered that to be successful it wasn't about technology and finance as I thought, it was all about people.' (Prtcp5)

An important difference in participants' views of strategic management, compared to that of the traditional academic strategic management view, concerned the importance placed by participants on people and organisational culture. Granovetter's (2005) concept of 'social embeddedness' (p. 35) is employed here as it suitably reflects that individuals, when making decisions, are impacted not solely by economic and analytic questions but that they are embedded in a network of social relations. The traditional view sees strategy primarily in economic terms and, therefore, pays little attention to the role of people, the human actors that do the strategy work (Whittington, 2003; Jarzabkowski & Spee, 2009). In this sense, strategy is predictably seen as the development of top-down goals formulated by the CEO (Porter, 2005) and senior management (Clegg et al., 2011) for others within the organisation to implement (Breene et al., 2007).

Participants in this research did not support the view that strategy practitioners could operate effectively 'at arm's length', and believed that effective strategy needed to be formulated and implemented by, and with, people in the organisation. The findings showed that the participants considered having an understanding of the social context alone to be potentially insufficient: it is being part of the social context that they viewed as important. As Uzzi (1996 in Granovetter, 2005) noted, social embeddedness requires repeated interactions which enable a level of 'trust and mutual understanding' (p. 43) to be established and this reflects the sentiments of participants. This view is aligned to Whittington's (2001) systemic perspective of strategy where decision-makers are not simply 'detached calculating individuals but individuals involved deeply in the social and cultural systems of the organisation' (p. 26). As a participant noted, 'you can't have a strategy without understanding the cultural change that goes with the strategy' (Prtcp14) and, arguably, to reach this level of understanding requires a level of social embeddedness.

A thought experiment (original to this thesis) employing a hypothetical military analogy helps demonstrate this finding and its impact on strategic management. The traditional view of strategy as a task able to be performed analytically by any informed individuals external to an organisation suggests that strategy practitioners are interchangeable. The logic that this appears to be based on is that if the analytical tasks are performed 'correctly', then the 'right' strategy will be identified and that organisational culture and social embeddedness are inconsequential factors. If this logic holds true then we should be able to swap equivalent strategy practitioners from one organisation to another, or in this case military generals from one army to another, with the same, or at the very least, similar strategic decisions and outcomes. In this thought experiment everything else will be held constant except the level of social embeddedness of the two military generals who will be swapped. The two protagonists are Arthur Wellesley (the Duke of Wellington) and Napoleon Bonaparte as they ponder their strategies for the upcoming battle near the Belgium municipality, Waterloo. History has generally recognised both as outstanding military strategists of their time with impressive records in warfare.

The altered situation described above is examined from Wellesley's perspective, as it is he who is now in command of the French army. Wellesley retains the ability to formulate a sound strategy to beat the English but, in his altered context there are two major impediments to his ability to be an effective strategy practitioner. First, has he been able to formulate a strategy with the French army's strengths and weaknesses taken fully

into account? This is not simply the quantitative information, such as numbers of men, weapons and equipment available, but the important qualitative and intangible information, such as the army's morale, effectiveness in differing situations, and the strengths and competency of his officers. Wellesley could, and should, seek council from senior officers who, now confronted with an English commander on their behalf, may be considerably less forthcoming than they would be with someone in whom they had developed trust and a mutual understanding (Uzzi, 1996 in Granovetter, 2005). It is considered that developing a strategy without first-hand experience and knowledge of the organisation would be more difficult because, as Rumelt (2011) notes, 'there is no substitute for on-the-ground experience' (p. 267). In some regards Wellesley, in true consultant style will need to borrow his officer's *montre* to tell them the *heure*.

The second impediment will occur when implementation of the strategy commences. As soon as Wellesley exits his tent and opens his mouth his troubles would likely start. *Merde*. It is difficult to imagine Wellesley having any chance of bridging the cultural chasm between himself and the French army despite being able to speak fluent French. Napoleon would suffer a similar fate with the English army, if not worse. It is considered that a likely result is that both armies would pack up and go home. In this situation it is important to reflect that the content of the strategy is likely to be totally irrelevant and that is a point worthy of pause. No matter how brilliant or insightful the strategy developed by either Wellesley or Napoleon, the content of the strategy will go largely, if not wholly, unnoticed. Both generals would be seen by their respective (new) armies as eminently qualified to formulate and lead the implementation of a military strategy in general, but neither is likely to enjoy cultural legitimacy in the social context in which they are now situated.

This interesting thought experiment allows insight into how social embeddedness has the potential to operate across the different aspects within the strategic management process. In formulation it allows strategies to be developed in full knowledge of the internal and external social contexts of the organisation. The strategy practitioner is inside the organisational 'black box' helping avoid the problem observed by Mintzberg (1998a, p. 177) - 'If you are so smart, why didn't you formulate a strategy that we dumbbells were capable of implementing'. In implementation it provides credibility, connectedness and legitimacy with individuals in the organisation. People in the organisation need to 'fundamentally understand why would I want to deal with you or

why do I come to work each day' (Prtcp12). This is, arguably, the basis for the interpersonal skills required to communicate, motivate and implement strategy effectively.

The thought experiment as described above, however, has a limitation that highlights the difference between a view that focuses on the formulation of a strategy and one, such as that held by participants in this study, that takes a holistic view. The experiment indicates that changing a military general, or by analogy, a CEO or strategy practitioner will likely result in failure, which practical experience indicates is not always the case. Indeed changing a CEO, for example, is often the catalyst for dramatic improvement in an organisation's fortunes although, again, this is not always the case. The thought experiment conducted previously has, therefore, effectively taken a view of strategy as an episodic event focused on formulation and not of strategic management as a holistic process. The military generals were swapped at the time an episode of strategy praxis was required and not at the start of the military campaign. In other words, the military generals were not given the opportunity to become socially embedded. Participants' holistic view of strategic management is analogously closer to that of a military campaign than a single battle. An amended version of this experiment is used to explore further learnings from this research later.

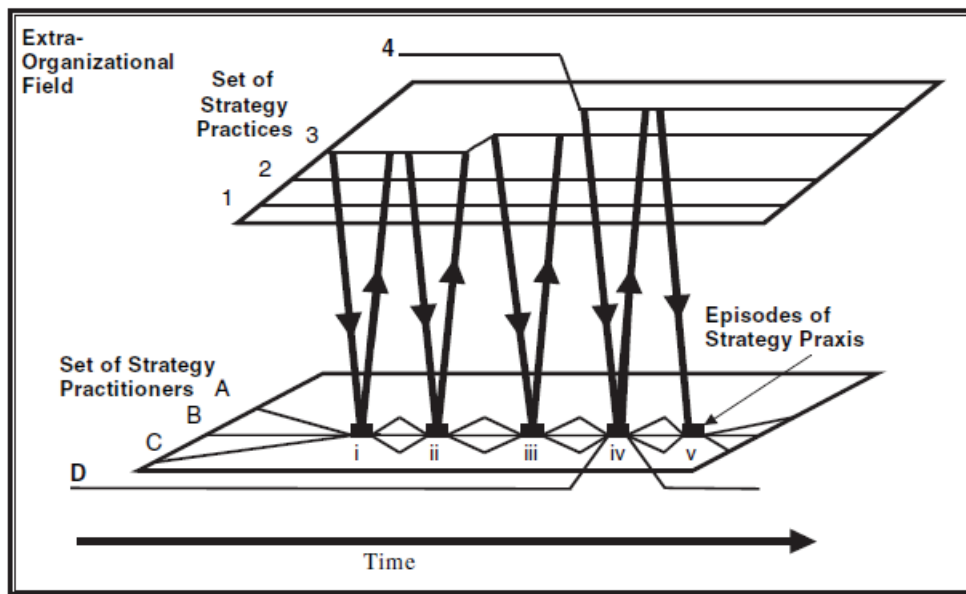
'Strategy stops with an outcome. If you don't get the outcome it's not really a strategy.' (Prtcp17)

The view of strategic management as a holistic endeavour is arguably closer to the SAP perspective's view than the one ascribed to either mainstream strategy research or the dominant strategic management paradigm. The dominant strategy paradigm, with its separation of formulation and implementation (e.g., Mintzberg, 2003; Clegg et al., 2011), and the process tradition within strategic management, with its strong focus on formulation (e.g., Hutzschenreuter & Kleindienst, 2006; Kachra & Schnietz, 2008), both appear to privilege the formulation of 'a strategy'. SAP, on the other hand, views strategy as something people do and, therefore, does not have a limited, formulation view of what strategy is. An aim of SAP research is to get closer to the world of the practitioner (e.g., Whittington, 2006; Jarzabkowski & Spee, 2009) and understand what strategy is from the perspective of the strategy practitioner (Paroutis & Heracleous, 2013). This

study has demonstrated that, for this group of strategy practitioners at least, strategic management concerns a holistic focus on being strategic and delivering outcomes for organisations and people as opposed to simply formulating a strategy. In other words, strategy (both deliberate and emergent) is embedded within strategic management. This, it could be argued, should come as a relief as it portrays a view of strategic management as both a valuable tool able to be employed effectively to deliver organisational outcomes as well as one that incorporates an ethical component by including people intimately in the process.

However, this more holistic view of strategy presents an interesting dilemma if it is to be incorporated into the SAP perspective. The terminology in Whittington's (2006) integrated framework (repeated as Figure 6.2 for convenience) of practice, practitioners and praxis, which is commonly employed in SAP literature, does not need to change on the surface. If, however, the holistic view of strategic management as emerging from this research is embedded into the integrated framework, then it can be argued that the framework must be altered, at the very least conceptually. Whittington (2006) does, however, identify that strategy includes all the activities involved in the deliberate formulation and implementation of strategy, yet this implies a more holistic set of activities involved in the strategic management process. The question of emergent strategy also needs to be examined. The term 'strategy practices', as it is more generally employed in the literature, has the potential to imply tasks associated primarily with the formulation of a strategy, such as strategic planning, annual reviews and strategy workshops.

Figure 6.2 – Integrating practitioners, practices and praxis.



Source: Whittington (2006).

An additional difficulty with employing a broader definition of strategy practices to encapsulate strategic management, as is the case in Whittington's (2006) framework, is that it is not easy to ascertain when activities are, and are not, strategic (Jarzabkowski et al., 2007). Conversely, narrowing the definition to activities, such as those mentioned previously, risks narrowing the definition (Jarzabkowski et al., 2007) to primarily formulation activities that are typically associated with mainstream research and the dominant strategic management paradigm.

One possible solution that is suggested is to change the label 'strategy practices' to a more holistic term, 'strategic management practices'. The logic in support of this approach is that it is the episode of praxis, and not the use of a particular practice, which determines whether the context in which the practice is employed should be regarded as strategic. Examples of strategy praxis noted by Whittington (2006), such as, 'board meetings, management retreats, consulting interventions, team briefings, presentations, projects, and simple talk' (p. 619) may, or may not, be episodes of strategy praxis dependent on the context, content and quality (an often forgotten variable) of the episode. Simple talk is obviously not always strategic but could indeed be a pivotal episode of strategy praxis. Importantly, the term 'strategic management practices' allows the selection and deployment of practices typically involved in strategy implementation activities without the need to label the practice as strategic. Project management, in this

regard, is similar to simple talk in that it can be equally applied to both strategic and non-strategic projects.

Continuing this line of reasoning, viewing strategic management in the terms of this study's participants raises the question of whether the SAP perspective has successfully located the strategy practitioner in the strategic management process. SAP has certainly identified the human actors involved in episodes of strategy praxis, and not before time, but by taking an episodic view of strategy praxis it appears to have identified people directly involved in an episode of strategy praxis as strategy practitioners. This study suggests that strategy practitioners are those involved in the more holistic strategic management process and this implies that strategy practitioners, on the one hand, appear in Whittington's (2006) integrated framework and on the other, are abstracted from it. They appear within the episodes of strategy praxis but they also are positioned external to the framework with a focus on enabling the strategic management process to deliver organisational outcomes. In other words, the framework, and arguably the SAP perspective when it is considering strategy practitioners, caters for an episodic view of strategy but not a holistic view of strategic management where this study's participants were found to be located.

If we return to our thought experiment but take a holistic view of strategic management this time, the results, it can be speculated, will be very different. This time Napoleon and Wellesley are swapped five years earlier, in 1810, well before the infamous battle near Waterloo. At this point in history Wellesley and Napoleon were likely in Portugal (Robson, 2014). Without wishing to underestimate the difficulties this swap would initially create, it is fair to conjecture that by the time both armies had camped near Waterloo the level of social embeddedness that Wellesley and Napoleon would be experiencing would be quite different given the campaigns both armies had experienced over the previous five years. It is likely, given that the experiment has allowed them to reach the prospective battlefield, that both our military strategy practitioners would have been able to develop the trust and mutual understanding required to be effective strategy practitioners and that the strategy now being developed would be seen as embedded within a holistic process focused on delivering the ultimate outcome of victory in the war. That leaves the intriguing question: who would have won the battle, and the war, in these circumstances?

6.2 STRATEGY PRACTITIONER DEVELOPMENT

'It would be interesting to test people who rely on their formal study to do their strategic thinking to see if there is a difference in the implementability of the outcomes. I can think of one person who did an MBA through a very prestigious school and who thinks he is now God's answer to business.'

(Prtcp1)

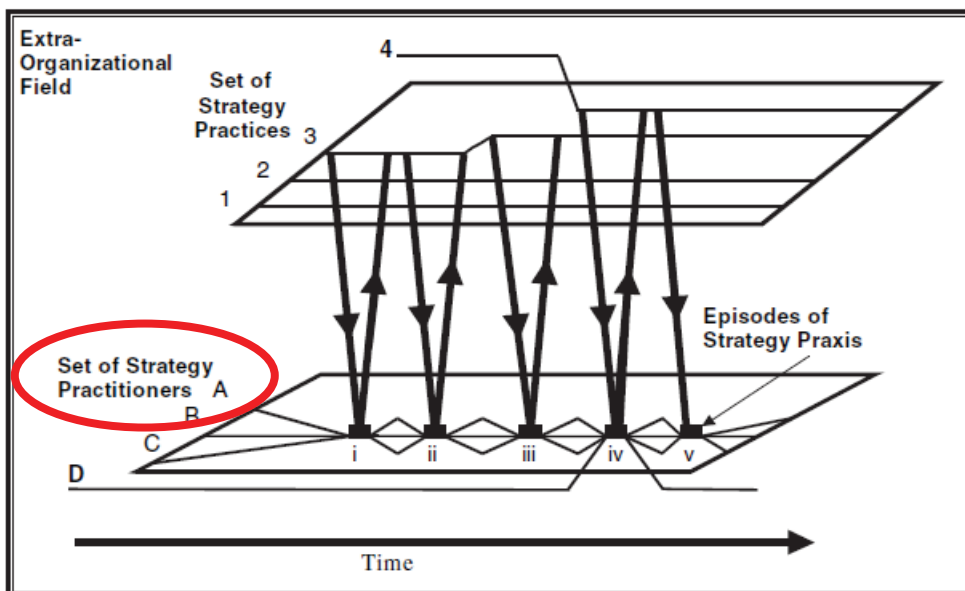
The purpose of this section is to discuss the main research focus for this study: how strategy practitioners develop their strategic management practices. The previous section discussed participants' holistic view of strategic management and it is within this view that they reflected on the events and experiences that significantly contributed to their development as strategy practitioners. The literature review demonstrated that there is a gap in understanding how this occurs (e.g., Whittington, 2006; Jarzabkowski & Spee, 2009; Cunningham & Harney, 2012) and, therefore, strategy practitioners are typically viewed as ahistorical. This study provides an empirical contribution to the SAP perspective and sheds light on this area by providing an understanding of how the strategy practitioners in this study developed their practices.

To summarise from the Findings chapter, participants developed their strategy practices primarily through learning from practice as opposed to through formal education in business schools or by reading scholarly or popular management literature. They learnt a range of skills and abilities from their early learning at university or through work experience and, as their careers progressed and they became more exposed to strategy and strategic management, their specific strategic management practices developed. Participants recognised that involvement with 'bloody clever' people during episodes of strategy praxis was vitally important to their strategic management practice development.

As has been observed, this is generally an unsurprising career path although it is noteworthy that few studies have examined how the general management discourse affects managerial practice (Kieser et al., 2015). In addition it appears to be significantly at odds with the expected career path of individuals in a professional field. When participants' development is looked at in greater detail two areas emerge which cause reflection, if not surprise. These two areas were the idiosyncratic career paths that practitioners in this study experienced and the lack of direct impact of business schools on practitioner development.

If participants were viewed solely in terms of their latter careers, when they had been engaged in strategic management praxis, the development path they followed is ably illustrated by Whittington's (2006) integrated framework. This framework was designed to demonstrate how practitioners and practices can adapt and develop over time through praxis involving both internal and external actors (Whittington, 2006) and reflects the findings of this study for the latter part of participants' careers. The framework does not, however, provide insight into how the strategy practitioners developed their strategy practices initially. In keeping with the observed view that strategy practitioners tend to be viewed as ahistorical, they simply appear fully formed at the start of the framework as can be seen in Figure 6.3.

Figure 6.3 – Integrating practitioners, practices and praxis.



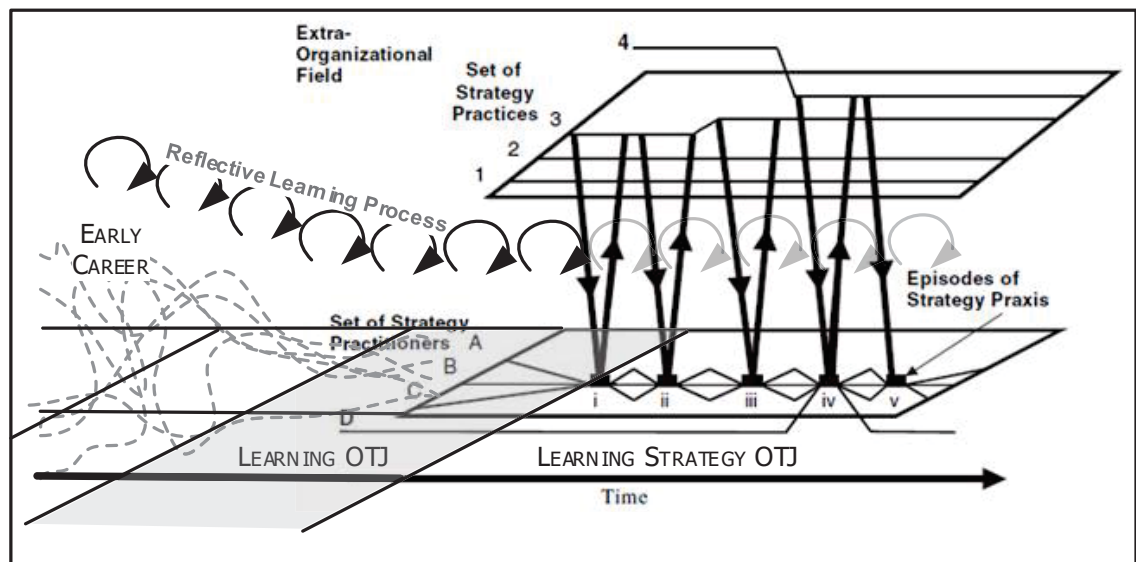
Source: Whittington (2006).

'Selling insurance would have to be the hardest bloody thing to do in the world I reckon.' (Prtcp13)

An important finding from this study was that participants developed their strategic management practices idiosyncratically and, significantly, participants identified that formative aspects of their development occurred throughout their careers including prior to becoming directly involved in strategy praxis. Their early-to-mid career roles were notable for the influence of the people they encountered and the range of eclectic

activities undertaken that were, in the main, not directly related to strategic management. The idiosyncratic paths that participants' careers took can be used, therefore, to extend the time dimension in Whittington's (2006) framework to add a historical perspective of strategy practitioner development. This is presented in the adapted version of Whittington's (2006) framework in Figure 6.4 which incorporates the stylistic, but apt, figure from the Findings Chapter. The grey area in this figure reflects that the transition to becoming engaged in strategy praxis (i.e., when we arguably can first apply the label of strategy practitioner) was also idiosyncratic and participants did not follow a uniform path or time frame.

Figure 6.4 – Adding a historical perspective of practitioner development.



Source: Adapted from Whittington (2006).

While this study did not directly focus on the learning process that participants employed, as the findings indicated that formal education through business school was not a significant factor, Figure 6.4 identifies that some form of reflective learning process is likely to have been employed. Reflective learning covers a range of topics, such as reflective practice, reflexive practice and experiential learning (Moon, 2004). Participants in this study recounted that they primarily learnt from being involved in 'real' situations as opposed to situations created for learning. This result is aligned with the work of Schön (1987, 1995) who discussed the concept of critically reflective practice as a way of embedding learning from work place situations. Whilst there were indications that reflective practice concepts may be applicable, this study did not seek to identify the actual reflective mechanisms participants employed.

The process of professional development depicted in Figure 6.4, in contrast with previous studies that employed simple demographic variables, contributes depth to understanding how strategy practitioners develop their practices. If participants in this study were represented by demographic variables such as tenure, age or business school education, then the picture would not only be different, it is likely to have been both inconsistent and difficult to interpret. If, for example the variable MBA education had been employed (or any other graduate level business school degree), then it may have been possible to positively equate the attainment of an MBA with the recognition of an effective strategy practitioner, at least for some participants. It was, however, through allowing participants to reflect on their experiences of their MBA education that a different picture emerged, questioning the value of this qualification to their practice development as strategists. This situation reflects the observation by Priem, Lyon, and Dess (1999) that when proxy variables are employed without intervening constructs (e.g., processes, attitudes and judgments), incomplete and error-prone conclusions, devoid of understanding, are likely. Allowing participants to reflect and articulate the meaning of their experiences was critical to allowing a more 'accurate' understanding of their practice development to emerge.

The illustration of strategy practitioner development also contributes to the strategic cognition literature which, as noted in the literature review, sought to understand the determinants of managers' knowledge structures (Finkelstein et al., 2009; Narayanan et al., 2011). This study has empirically demonstrated (while acknowledging the limitations of sample size) that the processes and paths by which participants in this study developed their knowledge structures regarding strategic management were diverse. It is important to reiterate that if participants were viewed only in terms of their identifiable experiences (i.e., a list of determinants) then, again, a different picture is likely to have emerged. Many experiences that participants reflected on as being influential in their development were known only to the participant concerned. Even if it was possible to gain a complete list for each participant, the question would remain as to which ones were really/actually influential and formative. Without participants providing meaning it would be impossible to determine, for example, that one participant viewed his or her social work degree as of more significance than his or her experience on an MBA programme. If the goal is to understand the determinants of practitioners' knowledge structures (i.e., their historical development), then it seems apparent that the research methods employed must access the subjective histories of practitioners.

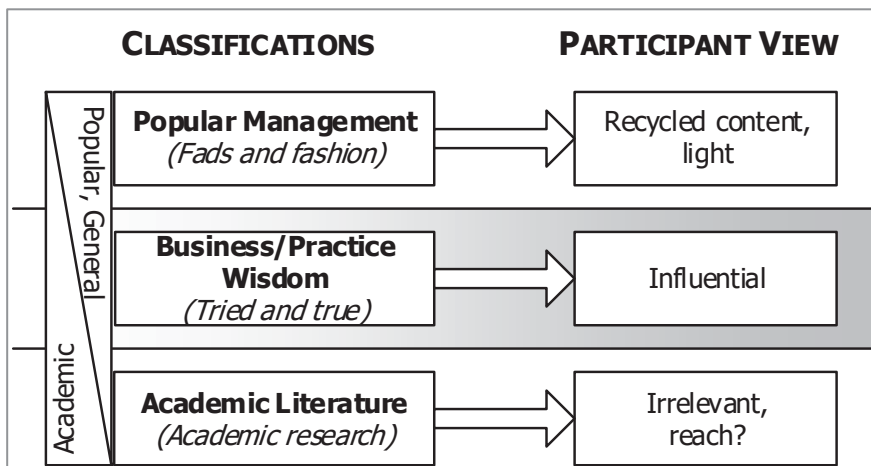
Whittington (2006) suggested that an alternative method for learning how strategy practitioners develop would be to track would-be strategy practitioners and to observe how they master strategy practices over time. This approach, however, raises some concerns. Firstly how, and when, is it possible to recognise *future* strategy practitioners? Bill, driving a bus or digging drains, would, along with most participants in this study, simply be overlooked (unless the study is impractically large). If recruitment into the research programme involved early career achievement at, say, business schools, again the majority of participants in this study would have been omitted. Arguably this method would only work if the majority of strategy practitioners came through a recognisable career path in the same manner as in the 'professions' which is not currently the situation, as evidenced by the contributors to this study. This study, on the other hand, has, in effect, approached the problem from the other direction by first employing a method of identifying effective strategy practitioners and then finding out how they developed their strategic management practices. Analogously, it would seem easier to interview current All Blacks and allow them to reflect on their experiences than it would be to identify, and then longitudinally follow a large number of potential All Blacks. This latter approach would (by necessity) start with most (nearly all) small boys (and possibly girls) born in New Zealand and many South Pacific Island nations.

With regard to the SAP perspective, this study, and the picture that has emerged, contributes to understanding strategy practitioners in greater depth. Following the examples of SAP researchers, such as Samra-Fredericks (2003), Rouleau (2005) and Beech and Johnson (2005), this study has sought to bring strategy practitioners to life by giving them voice and primacy. Their history and experiences, and the meaning they placed on them, has provided an interesting insight into how strategy practitioners develop their practices. The idiosyncratic nature of participants' early-to-mid careers and the lack of direct business school impact provides an interesting contribution to SAP's knowledge of strategy practitioner development and provides an empirical study in response to Whittington's (1996) observation that we do not know how strategy consultants, planners and managers acquire their skills.

'I'm a sponge. But what I tend to read are autobiographies and that comes back to what it is people are thinking about.' (Prtcp9)

The findings in regard to how literature (i.e., sources of scholarly and popular management) influenced practitioners were also of interest and contributed to the developmental picture that emerged. As the review of the extant strategic management literature indicated, scholarly research articles had no discernible impact on practitioners. The majority of participants did not mention academic literature, indicating that this literature not only has little direct impact, but also that it is unlikely to be read by participants, as noted by Gopinath and Hoffman (1995). Equally, though, participants placed little value on mainstream popular management fads and fashions, generally indicating a preference for the significant old over the trivial new (Mintzberg et al., 1998a). Participants identified that the sources of information that they found informative were biographies of individuals and organisations or material that they considered had stood the test of time, 'the good juice' (Prtcp12). These publications, it was observed, emanated from both the scholarly and popular management domains and were, therefore, given the label of business/practice wisdom for this study. This representation is depicted in Figure 6.5.

Figure 6.5 – Three classifications of management information



It was mentioned in the literature review that the impact that popular management has on practice is relatively unknown (Jackson, 2001; Madsen & Stenheim, 2013), with Clark (2004) noting that articles discussing this area often lacked empirical evidence. The reflections of participants that popular management had little direct impact on their development contribute to this scholarly conversation. The information participants did find of value reflected their idiosyncratic development paths and there was no indication that participants shared a common pool of business/practice wisdom. Indeed, it is considered likely that the material viewed by each participant as influential would be as

varied as the people who significantly impacted on each of their career development paths. In this regard, the literature that was observed to be valuable is aligned to the observed idiosyncratic career paths of participants – what they were reading at the time that they considered useful.

In regard to biographies of individuals and organisations, this aspect has parallels with participants' preference for experiential learning and could arguably be regarded as experiential learning by way of print. It is not possible to determine the number of these publications that emanated specifically from the popular management domain area as opposed to general interest publishing (it is assumed that academic literature does not typically publish this genre of material). Titles mentioned included those that would be included in popular management, such as *Built to Last* or Lee Iacocca's autobiography, yet there are others which would not be included, such as Edison's autobiography. One participant observed that thirty percent of his 'work bookshelf' comprised obvious management texts and the rest consisted of books, including fiction that inspired or provided a connection with his practice as a strategist.

The types of literature being consumed by strategy practitioners, and the impact achieved, is an area that could benefit from additional research (the focus of data collection in this study was not specifically on identifying specific publications). It is considered possible that while participants discounted the impact of management fads and fashions on their development, popular management may still influence management practice, a point that is returned to and discussed shortly in relation to the impact of business schools. An intriguing question is what it takes for a publication to become seen as business/practice wisdom. Is this due to marketing (i.e., a function of popular management) or does it require extensive practice affirmation? Also, is there a generally recognised subset of this classification or is it, as this study suggests, idiosyncratic?

With regard to the selection of research participants in this study, as was noted in the Method Application Chapter, the purposive method employed to identify and select them does not generally generate a probability sample and is, therefore, not suitable for producing data that can be confidently generalised (Magnani et al., 2005). Therefore, this study is not claiming that it is possible to infer that the population of strategy practitioners develop their practices in line with the participants in this study. It does, however, raise the question of why this group of strategy practitioners, selected through

a peer recommendation, appear to be a relatively homogenous group at the time of data collection though not, as may have been expected, well aligned to the dominant strategic management paradigm.

Insight into why the selection of research participants may impact on research findings can be found from research within the SAP perspective. Two studies that focused on strategy practitioners have been selected to contrast with this study to demonstrate that the selection method employed to identify strategy practitioners has the potential to influence the findings reached. The first study is Paroutis and Heracleous's (2013) research into first-order strategy discourse during institutional adoption. For part of their research they interviewed fifteen Chief Strategy Officers (CSOs) from firms listed on the FTSE 100. The reason they gave for selecting participants in this manner was the fact that 'due to their size and complexity of operations, they tend to employ managers with dedicated strategy roles' (p. 939). This selection method, it should be noted, is aligned to the TMT tradition, with selection based on an observable, demographic trait, in this case job title. The second study identified is Dameron and Torset's (2014) research on the discursive construction of strategists' subjectivities. They employed variation sampling to select and interview participants from three different groups involved in strategic management: leaders (i.e., CEOs); experts involved in strategising through their specific technical competencies (i.e., head of the strategy department, an external consultant, or an investment banker); and middle managers (characterised by their dependency on leaders for decision-making). It appears that this selection method used demographic variables to identify individuals in particular roles though the study does not make this explicit. The salient points regarding the method of selection and the study's findings are presented in Table 6.1.

Table 6.1 – Comparison of studies employing differing selection approaches.

Area	Paroutis and Heracleous (2013)	Dameron and Torset (2014)	This thesis
Selection Method	CSOs identified from 11 FTSE top 100 companies	Leaders, Experts and Managers from various organisations selected using variation sampling	Peer recommended strategy practitioners from various organisations
Method	Interviews (full study included an in-depth case study)	Standardised open-ended interviews	Responsive interviews
Practice Development	Not Stated	Not stated	Practice-based, experiential
Suggested Strategic Perspective	Traditional View Strategy in a functional dimension is seen in a classical sense, as goal-orientated, providing parameters for decision making and taking action. (p. 946)	Paradoxical View Balance between two perspectives: transcendent - based on analytical tools, competencies, and deliberate intentions - immanent - grounded in daily activities, speculation, opportunities. (p. 13)	Holistic View Participants viewed strategic management as a holistic process with a focus on organisational outcomes.

These three studies, which selected strategy practitioners employing different criteria, found differing views of participants' strategic perspectives. Paroutis and Heracleous's (2013) CSOs viewed strategy in four primary dimensions: functional where strategy was seen in a classical sense as goal-orientated; contextual where the meaning of strategy is contingent on the location of the activity; identity where strategists are distinguished through their strategic capabilities; and metaphorical where normative expressions of aspirational, directional and mechanistic metaphors are employed. These observations, it is suggested, indicate that this group of strategy practitioners view strategy in a relatively traditional manner – which may be entirely due to the selection technique. Dameron and Torset's (2014) mixed group of strategy practitioners, on the other hand, displayed what they termed 'paradoxical perspectives' (p. 298); a transcendent view based on analytical tools, competencies and deliberate intentions; and an immanent view (Chia & Holt, 2006) that considers strategy as emerging as a consequence of spontaneous human actions rather than of human designs. In contrast to these two studies, the strategy practitioners in the current study, as has been presented, viewed strategy primarily as a holistic endeavour focused on delivering organisational outcomes.

Neither Paroutis and Heracleous (2013) or Dameron and Torset (2014) supplied, or potentially collected, data on the history of participants, and it is not, therefore, possible

to determine the impact of participants' histories on their findings. However, speculating on the possible historical backgrounds of their participants allows a tentative explanation to be proposed as to the observed differences in the strategic perspectives of participants. It is ventured that Dameron and Torset's (2014) group of 68 strategy practitioners, made up of a mixture of leaders, experts and managers, is likely to contain a continuum of practitioners from those who have been traditionally educated in business schools to those who have developed their strategic practices through learning from experience. The analysis of these practitioners, seemingly as a homogenous group without taking participants' histories into account, may have contributed to their findings that the group contained paradoxical views on strategy. It is acknowledged that it is difficult to hypothesise the possible histories of Paroutis and Heracleous's (2013) seemingly traditionally orientated CSOs. The seniority of the role, however, suggests that formal education may be a factor leading to a more traditional view of strategic management.

It is possible to observe a similar situation in Regnér's (2003) study, employing personal observation and semi-structured interviews, where he found that managers at the periphery of organisations practise strategy differently from managers at the centre. He noted that the differences observed reflected their 'diverse location and social embeddedness' (p. 57). Regnér noted, however, that a potential limitation to the study was 'a lack of sophisticated psychology techniques in order to discover more detailed differences in sensemaking and knowledge structures over time' (p. 80). As has been discussed, a person's knowledge structure is his or her idiosyncratic view which has been built over time and, therefore, this limitation appears to allude to a lack of a historical perspective of participants. It is conjectured, therefore, that if the difference in practice observed is due in part to diverse location, if we re-enact our thought experiment from the previous section and swap the practitioners between locations, we would expect to observe similar results to those found by Regnér. In other words the idiosyncratic view of the practitioner would have less impact on practice than the location of praxis (holding social embeddedness as constant). It would be interesting to conduct this experiment empirically in a way which could lead to rich insights, such as the role of practitioners' backgrounds in determining practice as opposed to the extent that practice is a localised shared collective. Experimenting with an organisation in this manner is, however, unacceptable from research, ethical or commercial perspectives.

Whilst, therefore, it is not possible to draw any firm conclusions at this stage regarding how the selection of strategy practitioners may impact on research, the practice of employing demographic variables and ignoring the history of practitioners to select research participants appears to be problematic. In many regards this approach seems to be at odds with the very SAP perspective that seeks to get closer to the world of the practitioner and thus differentiate itself from mainstream strategy research (Golsorkhi et al., 2010a). Employing selection methods that ignore the history of individuals has the effect of freezing them in their current situation. For example, the majority of academics, likely to have a university orientated job title, would not be regarded as strategy practitioners irrespective of their practice-based experience. If, however, we accept, as the literature suggests we should, that strategy practitioners will have developed idiosyncratic knowledge structures regarding strategic management that will significantly impact on their view and practice, then their history is likely to be an important influence in their practice that should be factored in to research design.

It is acknowledged that the research into TMTs and strategic cognition often employed a historical perspective, such as tenure but, as it has been argued, simple demographic variables typically employed are not sufficiently sophisticated to capture the phenomenon of interest (Markóczy, 1997; Priem et al., 1999). This study, in alignment with researchers in the SAP perspective (e.g., Jarratt & Stiles, 2010; Rouleau, 2010), employed a selection method that incorporated the opinion of practitioners. This is, in effect, a judgement of historical effectiveness and indicates that the practitioner has demonstrated effective strategic management practice. Whilst it is readily acknowledged that this is an entirely subjective measure, in line with the observation that peers can perceive skilled practice (Schön, 1987; Jarzabkowski & Whittington, 2008c), it appears that it may, nevertheless, be a relatively stringent criterion.

Finally, a key stimulus for this study was provided by Whittington's (2006, p. 626) observation that 'given the investments involved, how strategy practitioners are best produced is an urgent research question.' As was noted previously in this thesis, how strategy practitioners are 'best' produced is a difficult question to address as the strategic management community is yet to agree on what is 'best'. This research has provided an empirical study of how effective strategy practitioners in New Zealand, recognised as such by their peers, are produced today. The fact that the study demonstrated that practitioners did not share a career development path, let alone a path that was heavily reliant on academic input, is problematic if the goal is to enhance academia's ability to

produce them. It is analogous to commercial flower growers discovering that the flowers they want to cultivate commercially, given the current state of knowledge, grow best when left in the wild.

6.3 THE RELATIONSHIP OF BUSINESS SCHOOLS TO PRACTICE DEVELOPMENT

'Hateful day when I received life! I exclaimed in agony. Accursed creator! Why did you form a monster so hideous that even you turned from me in disgust?'

Mary Shelly

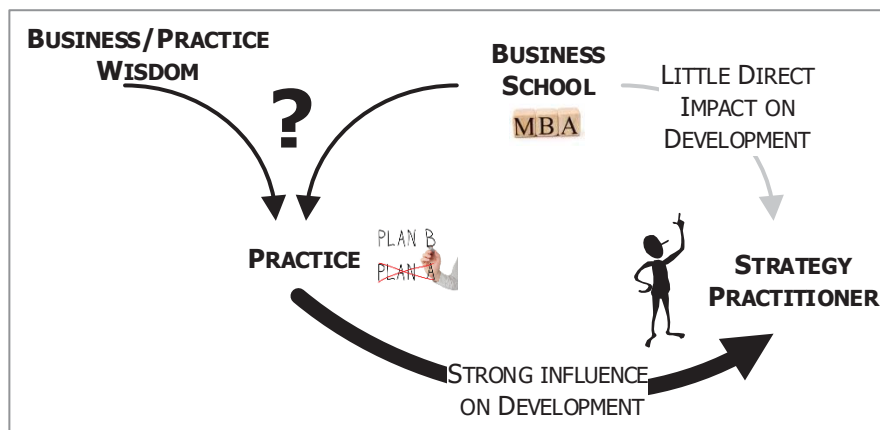
The purpose of this section is to discuss the impact and relationship that business schools have on the practice development of strategy practitioners. The varied and idiosyncratic career development paths, combined with the finding that business schools did not significantly impact directly on practitioner development raises the question of what the relationship of business schools is to the development of practices and practitioners. Given the extent of business school operations over decades it is considered unlikely that there is no relationship, even given the findings from this study that business schools had minimal direct impact.

I think one of my criticisms of the MBA which, isn't a new criticism, would be that it was very focused on business process more than on the people side of effective leadership of organisations. Effective strategy is as much about people. (Prtcp8)

This study adds an empirical contribution to the debate on the relevance of business schools to the development of strategy practitioners. The findings of this study support authors (e.g., Bennis & O'Toole, 2005; Jarzabkowski & Whittington, 2008a; Rubin & Dierdorff, 2009) who have questioned the relevance of business schools to practice and clearly indicated that business schools had little direct impact on practitioner development. Validation, confidence and networks were the three main areas that participants identified as being beneficial from attending business school. It is acknowledged, however, that the relationship between business schools and practice is far more complex than is described above.

In addition, those who had not attended business school did not indicate that they considered this to be a gap in their practice development. Whilst it is acknowledged that the number of participants in the study exposed to business schools, in particular at a postgraduate level, was relatively low, potentially more informative is the fact that a third of participants were able to develop effective strategic management practices, recognisable to peers, without the need to be exposed to business school education at all. Figure 6.6, therefore, depicts the updated situation incorporating this study's findings of the minimal direct impact of business schools and the strong influence of learning from practice. The complexity of the relationship between business schools and practice is a potential area of consequence that will be discussed in greater depth shortly. An additional area that has been included in Figure 6.6 for completeness reflects that business/practice wisdom, as previously discussed, has the ability to impact on practice though, as has been noted, the extent of this is relatively unknown (Jackson, 2001; Clark, 2004; Madsen & Stenheim, 2013).

Figure 6.6 – Business school impact on strategy practitioner development.



The SAP literature contained few studies focused on strategy practitioner development. This issue was also discussed by Whittington (2006). He, too, seemed to discount business schools as a factor in practitioner development. His integrated framework, which has been discussed and modified in this thesis, does not include any reference to the impact of business schools on practitioners, practice or praxis. It is absent. It could be argued that business school education is logically involved prior to strategy practitioners entering episodes of strategy praxis, although this study does not support that view and Whittington does not make this argument. In fact he suggests the opposite, that it is praxis that makes practitioners, in a kind of apprenticeship where they 'gradually learn to become full members of the group, absorbing its particular mix of

local rules and internalized standards' (p. 627). This study supports this view but, equally, it found no evidence that participants learnt directly through business school education early in their careers, or later if they attended business school mid-career, post-experience.

It is important to state that the data gathered in this study does not allow the relationship between business schools and practice to be discussed in terms of what has been found. However, the point which the study has reached allows for an exploratory discussion as to what may be occurring. This study has shown that learning from practice was influential and formative for participants and, therefore, what is practice, what influences practice and, significantly, what *has* historically influenced practice is important. Practice, in the sense that it is being employed, is associated with the view held by practice theory that it is a 'shared possession of a collective' (Barnes, 2001, p. 25) or a shared practical understanding (Schatzki, 2001). In other words, practice is not seen in terms of individual human agency and is a kind of practical intelligence with individuality construed as a secondary effect (Chia & MacKay, 2007). Practice and the aspects that influence it is, therefore, logically an area of central importance to the SAP perspective both from a research and methodological perspective.

The literature demonstrated that a dominant strategic management paradigm exists that has a significant impact on strategic management practice. This paradigm, associated with classical, rational, economic-based planning approaches, achieved a position of dominance in the 1980s within academia (Mintzberg et al., 1998a) in the United States of America, and was then exported to other parts of the world (Starkey & Tempest, 2001; Engwall, 2007). Research in this area tends to suggest that it has been business schools that have influenced practice. The reverse situation, in which the impact of practice on business schools especially via strategy consulting firms has, however, been observed by several strategic management authors (e.g., Mintzberg et al., 1998a; Kiechel, 2010; McKenna, 2012).

McKenna (2012) notes that management theorists have acknowledged that strategic management has been profoundly influenced by management consultants, and that the new strategy consulting organisations have etched their brands into the strategy vocabulary. McKinsey's three horizons model, and the BCG (Boston Consulting Group) experience curve and matrix provide good examples of this phenomenon (Kiechel, 2010; McKenna, 2012). In many regards the history of strategic management has been

constructed to serve the purposes of authors and the discipline itself (Thomas et al., 2013) and it is most likely that the relationship between business schools and strategic management practice will be bidirectional with the position of dominance waxing and waning. What is arguably more important is the apparent outcome of the historical process which, as has been identified, is the emergence of a recognisable and powerful managerial discourse related to power and identity (Knights & Morgan, 1991). This has been termed a dominant strategic management paradigm (Clegg et al., 2011), one which has become a largely unquestioned orthodoxy (e.g., Stambaugh & Trank, 2010; Tengblad & Vie, 2012; Thomas et al., 2013).

The relationship between business schools and practice has been an active area of inquiry and debate within the academic community under the label the rigour-relevance debate. This debate effectively examines the influence of management research on practice. Kieser et al. (2015) have recently summarised the literature in this debate identifying fundamental problems which they indicate stem from the fact that much of the literature and proposed solutions lack adequate theoretical and empirical foundations. They propose a way forward involving four areas of focus: 'to identify and develop theoretical frameworks and concepts; initiate specific empirical research projects, identify suitable methodological approaches; and examine the impact of the relevance debate on management research and practice' (p. 214).

This study indicates that this is an important area of research as what could, should and does influence strategic management practice is arguably the most influential aspect of strategy practitioner development. If it can be shown that business school research and teaching can shape and inform strategic management practice, then it is important to ask how strategic management pedagogy and research should be configured to 'best' influence practice, practices and practitioners. This situation seems to reflect part of Burgelman and Grove's (2007) memorable article title, 'let chaos reign, then rein in chaos.' If, on the other hand, it is shown that business school research and teaching has little ability to impact on strategic management practice then it appears that the strategic management environment is possibly parodying Mary Shelley's creation *Frankenstein*. Born in the post war United States of America and brought to life through the 1980s by business school economic views and consulting firm activity, it now exists, arguably unloved, out of the reach of its creators, unable to be shaped or changed.

I think it's actually doing it. It's a discipline you learn more by doing than reading. (Prtcp7)

The idiosyncratic development of strategy practitioners, as it has been presented and discussed in this study, has implications for the debate regarding whether strategic management could, or should, become a profession like law or medicine. As was documented in the literature review, there are two schools of thought in this regard. Some authors (e.g., Khurana & Nohria, 2008; Rousseau, 2012a) argue that this would be a positive move to improve management's effectiveness and legitimacy; whilst others (e.g., Schön, 1995; Hay & Hodgkinson, 2008; Barker, 2010) argue that management is complex, involving social, political, moral and emotional dimensions and, as such, there is no professional body of knowledge that can be easily identified, let alone transferred (Hay & Hodgkinson, 2008). While this debate is seemingly most often conducted at a theoretical level, this research adds an empirical contribution to the discussion and questions whether strategic management would be positively served by attaining, or attempting to attain, the status of a profession.

As has been demonstrated, participants' career paths do not resemble the typical, structured paths of most, if not all, professions. Accountants, lawyers, doctors and engineers are all required to meet strict educational and experiential obligations before they receive their credentials and are allowed to practise. This is not to imply that individuals within those professions may not have had as varied careers as participants in this study prior to entering their chosen profession, but once they enter their chosen profession the path they are required to follow is typically well structured, well-trodden, predictable and hence prescriptive. By contrast the paths of strategy practitioners, along with many politicians, assassins, prostitutes, directors, dictators and consultants do not. As is evidenced by this study, participants developed their practices primarily through management and strategy praxis complemented by diverse early career education and life experiences. Following a career path such as this in medicine or law would be, among many other things, stressful.

It is argued that the move towards attaining the status of a profession will improve management's effectiveness and legitimacy (Khurana & Nohria, 2008; Barends, 2015). Whilst this argument appears to contain a certain logic that qualified practitioners will perform better and more ethically, this study questions the performance part of that

logic (the ethical nature of participants' practice cannot be commented on as this was outside the scope of the study). The participants in this study were all recognised as effective strategy practitioners by peers yet, if strategic management was a profession, then the majority of participants, lacking what is assumed to be the required credential, a business school degree, probably the MBA, would not be seen as qualified to practise. If this was the situation then one participant in particular would have struggled to obtain their accolade for services to business. Additionally, if all participants were required to obtain a business degree, it would be possible to ask whether their practice would still be recognised as effective by their peers. As has been observed, participants in this study exposed to business school education did not credit this as being significant in their practice development whilst, as Currie, Knights, and Starkey (2010) observed, many MBA graduates, arguably well qualified, have been involved in the global business disasters of the Twenty First Century.

MBA's were worth something then. (Prtcp1)

With regard to strategic management pedagogy, this study tends to cast a shadow on the ability of business schools to directly influence strategy practitioners through teaching. Those participants exposed to business schools placed little value on their experiences in regard to their strategic management development, while those who had not been exposed did not feel that this was a significant omission in their ability to practise effectively. This finding was, again, not wholly unsurprising given the extent of criticism of the relevance of business schools to practice that was identified in the literature review.

However, a limitation of the study concerns the age of participants and how this may have contributed to a cohort influence in regards of business school experience⁹. The average age of participants was estimated to be 50-55. When this is compared to the estimated average age of MBA attendees of 30 (Bocchi, Eastman, & Swift, 2004; Young & Pinsky, 2006), the time when participants are likely to have attended business school, or to have potentially considered attending business school, can be approximated to the

⁹ I would like to acknowledge that this idea was suggested by the late Ralph Stablein during one of our chats over coffee. His depth of experience and considered views are missed.

mid-1990s. The literature revealed that during this time the focus and content of strategic management courses would likely have been dominated by an economic-based view with the course content emphasising theory and analytics over practice (Starkey & Tempest, 2001; Greiner et al., 2003; Mintzberg, 2003; Engwall, 2007). Given what participants in this study view to be strategic management, the focus of business school courses in this period may be seen to be at odds with participants' current views. It is acknowledged that this would have been a formative period in participants' development but, as the findings demonstrated, participants viewed their early careers and life experiences as being influential and therefore, by the age of 30, they were not a 'blank canvas' and already had a range of formative experiences.

The changes in the focus of business schools as they seek to adopt new approaches to maintain their relevance (Datar et al., 2011), as noted in the literature review, may well be starting to change this situation, with studies finding that obtaining an MBA was more valuable than critics generally contend (Simpson et al., 2005; Hay & Hodgkinson, 2008). Countering this, however, is the likely continued influence of the dominant strategy paradigm and, therefore, this is an area within the overall rigour-relevance discussion where additional research would assist in understanding the contemporary situation within the context of this debate.

6.4 SUMMARY

This chapter has discussed the findings from this study and their implications. In many regards the findings are interrelated and this reflects the fact that strategic management itself is intimately related with the practitioners themselves that practise in its name. The participants' view of strategy as a holistic endeavour emerged as being critical in the study as it not only provided a stimulating insight into how participants viewed strategic management, the informed view, but it also reflected what it means to be a strategy practitioner. This study's participants both appear in an episodic view of strategic management and, at the same time, are abstracted from it with a holistic focus on enabling organisational outcomes. The thought experiment employed highlighted participants' view of strategic management as being holistic and that they saw strategy praxis as embedded within broader strategic management. Related to this is their recognition that effective strategic management requires a level of social embeddedness for its conduct.

The view of strategic management as holistic impacts, in turn, on the practices participants' viewed as being required to be an effective strategy practitioner. This was evident when participants reflected on the events and experiences that significantly impacted on their development. Participants developed their practices idiosyncratically through various career paths. In conjunction with learning from practice, they regarded notable literature and involvement with a broad range of people as both significant and valuable in their development. Through the meaning participants attributed to important aspects of their development, this study has been able to contribute an empirical contribution that goes well beyond demographics to understanding how strategy practitioners develop their practices.

The chapter identified, and discussed, that the study has implications for the SAP perspective and indeed the strategic management field. Firstly, the selection of strategy practitioners without considering their historical development has been identified as an area that may be problematic, especially for studies seeking to understand how strategy is practiced. Second, business school education was not identified as a direct, meaningful contributor to the participants' development though this raised the interesting question of the relationship between business schools and the collective view of practice. This is an existing area of significant academic interest. Finally, the discussion of participants' idiosyncratic career paths contribute to authors who question whether the strategic management field should, or could, attain the status of a profession such as law or medicine.

CHAPTER 7 - CONCLUSION

'Begin at the beginning,' the King said, very gravely,
'and go on till you come to the end: then stop.'

Lewis Carroll

The purpose of this chapter is to provide a reflective synthesis of the results and a critical review of the research method undertaken during this research. First, the chapter will identify where this study has contributed to knowledge. Then the study's contributions to research method will be discussed because the broad technique was an important area of discussion throughout the research process. The study's limitations will be discussed before identifying areas where further research is required. Finally the chapter, and the thesis, finishes where it began, with useful lessons for Alice, the Cheshire Cat, and perhaps even Lewis Carroll.

7.1 A SYNTHESIS OF FINDINGS

The purpose of this section is to identify where this study has provided insight and, thus, contributed to knowledge. This study set out to learn how strategy practitioners develop their practices and, in particular, the impact that business schools and popular management had on their development. The specific research questions that guided this study were:

How do strategy practitioners develop their practices; the skills, abilities and knowledge they use during episodes of strategy praxis?

What impact do business schools and popular management have on the development of strategy practitioners?

This study has contributed to knowledge and scholarly conversations in four main areas. Firstly, this study has demonstrated that the dominant 'academic' strategic management paradigm did not, as its name suggests, dominate the view that the strategy practitioners in this study had of strategic management. The practitioners interviewed in this study held the view that strategic management was a more holistic endeavour with formulation, implementation, people and organisational culture all being important aspects. This difference in understanding presents a significant departure from the

traditional, rational view of strategic management found in the academic literature. While this area was not a specific research area that had been identified prior to entering the field, it was an intriguing finding in its own right as well as being important because it reflected how participants saw themselves as strategy practitioners and, importantly, the practices, skills, knowledge and abilities they, therefore, believed they needed in order to be effective. This unintentional insight of strategy from the practitioners' perspective, the informed view, subsequently contributes to the SAP perspective regarding how strategy practitioners actually view strategic management. As suggested in Chapter 6, this should come as relief to both the business and academic communities as it portrays a view of strategic management as being both more valuable and, arguably, responsible in its contribution to business performance.

While participants' view of strategic management as a holistic activity was argued to be closer to the SAP perspective than the view held by mainstream strategy research, this holistic view was not found to fit neatly into the dominant SAP perspective. The SAP perspective, with its focus on episodes of strategy praxis (e.g., Hendry & Seidl, 2003; Whittington, 2006; Rouleau, 2013), appears to have identified people directly involved in an episode of strategy praxis as being strategy practitioners (e.g., Jarzabkowski & Spee, 2009; Vaara & Whittington, 2012). This study suggests that strategy practitioners are those involved in the holistic strategic management process, implying that they are involved directly within episodes of strategy praxis as well as being abstracted from this episodic view in order to maintain their holistic perspective. The question this raises, in regard to identifying strategy practitioners, is whether the SAP perspective located them within its view of strategy or whether a more holistic view of strategic management is required where this study's participants are arguably located.

Second, the study provided an empirical contribution to the SAP perspective, as well as to the closely aligned area of strategy cognition, regarding how strategy practitioners develop their practices. It was demonstrated that the strategy practitioners in this research developed their strategic management practices primarily through learning from practice. They learnt a range of skills and abilities from their early learning at university or through work experience and, as their careers progressed and they became more exposed to strategy and strategic management, their specific strategic management practices developed. The study showed that business school education had little direct impact on their development as strategy practitioners. This, however, left an

interesting question regarding the impact that business schools have on 'practice' as a shared collective (Barnes, 2001; Schatzki, 2001).

Third, the idiosyncratic development of strategy practitioners contributes to the current debate as to whether strategic management could, or should, become a profession like law or medicine. Participants' idiosyncratic career paths in this study were not found to resemble the typical, structured paths of the more obvious professions. Strategy practitioners appear to share more in common with politicians, assassins, prostitutes, directors, dictators and consultants. The argument that attaining the status of a profession has the potential to improve management's effectiveness (Khurana & Nohria, 2008; Barends, 2015) was questioned as the majority participants in this study, all recognised as effective strategy practitioners by peers would, if strategic management was a profession, be forced to retrain.

The fourth area where the study provided a contribution is in regard to the academic literature. Scholarly literature, as was expected, was concluded to have little impact on practitioner development and, as such, was not found to add to practitioners' knowledge in this area. However, contributing to the conversation on the impact of popular management on practice, the findings indicated that management fads and fashions also had little impact on these particular participants. Of interest was the category identified as business/practice wisdom which contained material that participants considered to have stood the test of time as well as publications on individuals or organisations. This material, which appears to have emanated from the scholarly, popular management and general interest domains, raises the question of what is required for a publication to become seen as business/practice wisdom, and whether there is a generally recognised subset of this classification or whether it is, as this study suggests, idiosyncratic.

In many regards these four areas identified are linked through the participants' view of strategic management. While it was not a direct area on which the research was initially focused, how participants viewed strategic management impacted significantly on how they viewed themselves as strategy practitioners, the purpose of strategic management and, vitally, the practices they believed were needed to be effective. Building logically backwards, when they reflected back upon their careers it was the experiences and events that contributed to the development of a broad set of practices that enabled them to be effective, holistic strategy practitioners delivering organisational outcomes. The

implication from this is that how a practitioner views strategic management will have a significant influence on how he or she practises and this has implications for research.

7.2 A REVIEW OF METHOD

Upon reflection, a narratives of practice approach was found to be ideally suited to answering the research question, as regards methodology and method. The approach allowed participants the opportunity to reflect and provide meaning allowing the collection of the rich, deep data required in order to learn about the development of strategy practitioners from the perspective of strategy practitioners. Indeed it is possible to conclude that to understand how strategy practitioners develop their practices, a narrative-biographical perspective or one methodologically aligned is required to access the important, subjective meaning that participants placed on the value of their experiences. Without this meaning, no matter how detailed a participant's history, it will be left to the researcher to deduce which aspects are formative. Although the process of deduction may remain dependent on knowledge of practice, it certainly requires substantive knowledge of theory.

Secondly, how strategy practitioners are identified is potentially an important factor that appears to be seldom factored in to research design within the SAP perspective. In particular, the selection of participants based on demographic variables, such as job title, is seen as problematic for a perspective that seeks to understand practitioners as real, human actors. Aligned to the observations in the previous section, it is considered that a strategy practitioner's history, his or her idiosyncratic knowledge structure, is influential in how he or she views and practises strategic management and, therefore, is an important aspect for research focused on strategic management practice.

It was of interest to observe the current debate within the SAP perspective regarding its philosophical and methodological foundations and, effectively, where it should be in the future (ironically a strategic view). Whether it aligns itself with the more traditional strategy process research agenda or fully embraces the tenets of a practice theory approach is of significant interest. Currently the perspective allows for a wide range of methodologies and methods, which has been observed to be both a positive and a negative (e.g., Vaara & Whittington, 2012; Rouleau, 2013). SAP's evolution will impact on its future research agenda and those researchers within the currently broad perspective. From the viewpoint of this study, the SAP perspective has been instrumental in allowing a broad range of methodologies to investigate strategic management and in

particular the people, the human beings, the strategy practitioners who have always been arguably the most important aspect in success, or otherwise, of strategy. From the literature it appears appropriate, therefore, to note that the strategic management academic landscape has been enhanced through the efforts of SAP researchers.

This study has limitations which are now identified and discussed. First, it was acknowledged that the purposive method employed to identify and select participants for this study rarely generates a probability sample and is, therefore, not suitable for producing data that can be confidently generalised (Magnani et al., 2005). Therefore, in order to ascertain whether the findings produced from this study are typical or atypical will require further research. As has been noted, this could be achieved by repeating the study in different geographical settings. However, the study indicated that how strategy practitioners are identified and their history may be significant in the research process. It is considered that the development of a robust method that factors in this aspect would make for enlightening research.

Secondly, and arguably the most significant limitation with this research, is the potential cohort influence which limits the study's ability to provide an understanding of the contemporary situation. This has been discussed previously. Selecting participants through the use of a peer recommendation process may have resulted in selecting experienced strategy practitioners (i.e., practitioners who have demonstrated their strategic ability over time) and are, therefore, likely to be older. This was observed to be the case in the current study. The issue that this creates is that the significance of areas such as business school education on practitioner development is likely to involve assessing a historical perspective of the phenomenon and not a contemporary one.

A final limitation that needs to be discussed is in relation to geography and associated with this, organisational size. New Zealand has few organisations that would be considered large on an international scale and it could be argued that participants' strategy experience could be affected by this factor, requiring them to be more generalist in their strategic orientation. Countering this, whilst participants were primarily based in New Zealand, their experiences often included large multi-national companies and international consulting firms. The participants, as a collective, did not diverge in their views based on their relative organisational experiences. In many regards, the aspect of organisational size returns to the question of what strategy is. Is it solely reserved for large publicly listed companies and, therefore, are strategy practitioners only to be found

within these companies? It has been identified previously that the method of selecting strategy practitioners may impact on findings though this is considered to be more in relation to the absence of a historical perspective than it is to be related to their current employer which is a demographic factor.

7.3 ADDITIONAL RESEARCH

Exploratory research appears to have a tendency to provide insight into one area while highlighting a range of neighbouring areas of interest. The first area identified that would benefit from additional research is the current research focus, the development of strategy practitioners and their view of strategic management. Repeating the study in different geographical settings to test whether the findings of this study are typical or atypical would be of significant interest and would provide insight into whether differences exist between, say, North America and countries that are more influenced by European thinking. This would also address the question of whether this study's findings in regard to the direct impact of business schools on practice development are the norm.

This study indicates that an important area of research, already well known to the strategic management academic community, is the area sometimes referred to as the academic-practice divide. This study indicates that what could, should and does influence strategic management practice is arguably the most influential aspect on strategy practitioner development. The Kieser et al. (2015) summary of this area and, more importantly, their proposed way forwards appears to be timely. In particular their argument for more research on how the general management discourse affects managerial practice resonates with this study.

The impact of literature, in its broader sense, on strategy practitioners and practice would also benefit from additional research, as this study did not specifically focus on data collection concerning this factor. The identification of a business/practice wisdom as a possible separate classification of literature needs to be tested and, as discussed previously, it needs to be determined whether there is a generally recognised subset of this classification or whether it is, as this study suggests, idiosyncratic?

Finally, it was observed that participants were likely to be employing a reflective learning process given that their most formative experiences came outside of formal education. This study was not able to provide more than this observation and it would be of interest to understand in greater depth how participants were able to reflectively develop their

practices over time. In this regard, what made the learning ability of this group of practitioners different from, and arguably superior to, that of other individuals who had a similar range of experiences? Whilst it is acknowledged that it is unlikely that practitioners will read this thesis, this study confirming that academic literature is seldom read by practitioners, they should also be comforted that they are in the right place, in the world of practice, to learn and develop effective strategic management practice. This area of research may provide insight into how practitioners can avoid the trap one participant observed, 'you can have 20 years of experience or 1 years' experience 20 times' (Prtcp7).

This study has implications for strategy practitioners as well as would-be strategy practitioners. Firstly, by significantly valuing learning from practice, it can be argued that participants are reflecting that it is unlikely a short cut to becoming an effective practitioner exists. Indeed the study revealed that experiences throughout an individual's career are valuable if the lessons can be embedded. 'Your mind is like a parachute, works best when it is open' (Prtcp12). Secondly, seeking out 'bloody good people' (Prtcp2), and being exposed to strategic management practice, is valuable for practice development. Naturally, it is not possible to know in advance whether the people are good, or the strategic management practice effective, but, along with the participants in this study, this discretion is likely to develop with these experiences. It is okay to burn your fingers as long as you do not lose them completely (Prtcp16). Thirdly, as a strategy practitioner it is essential you maintain a focus on the organisational outcomes of the strategy and this is likely to require a level of social embeddedness. This also implies that you will need to be hands on in the cut and thrust of episodes of strategy praxis as well as abstracted to maintain a holistic view of the strategic management process.

A final reflection from this study for practitioners is that throughout their careers they will be in all three positions that the *Alice in Wonderland* analogy has exposed. They will be Alice, involved in episodes of strategic management and, at times, they will lack the practices required for the situation. The episode will help their development as long as they are able to reflect and embed the lessons available. They will be in the position of the Cheshire Cat (hopefully less laconic), able to provide expertise and guidance to people in both episodes of strategic management and individual career development. Finally, they will be in the position of Lewis Carroll, responsible for the development of an organisation's story as well as all the people (the characters in the story) within the organisation.

At the completion of this journey, it is time to return to Alice to see if it is now possible to offer her some insight into which way she should go. Taking her history into account, as this study indicates is essential, it is possible to deduce that this is the first time she has been down a rabbit hole and that Lewis Carroll did not bother to equip her with the practices and wisdom she needed for her encounters on route. Allowing Alice to sink or swim can be anticipated as being deliberate on the authors behalf, but in a twenty-first century organisation this approach would be seen as neglectful, almost an abrogation of managerial responsibility. A possible solution available to Lewis Carroll would be to equip the Cheshire Cat with adequate humanity and humility, traits likely to have been encountered by the participants in this study who invariably benefitted from constructive influences throughout their careers. The Cheshire Cat could, then, undoubtedly help Alice swim. Without this, however, it seems possible to only repeat the guidance offered by the Cheshire Cat. We can console Alice that the best way she can gain experience is by practice. She will then find herself much better equipped in the future if she ever finds herself back down the rabbit hole.



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APPENDIX 1 – PARTICIPANT INFORMATION SHEET



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Strategic Thinking and Decision Making

INFORMATION SHEET

Background

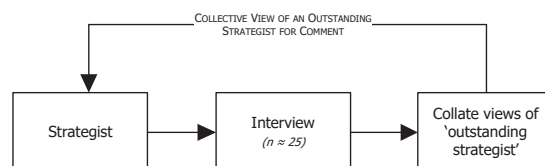
I am currently both a business consultant and working towards a PhD at the School of Management, Massey University. The main focus of my research (and my main interest as a consultant as well) is on strategic thinking and decision making. To be more specific, to determine how and where strategists acquire the knowledge and skills that they use in strategic thinking and decision making. The majority of research in strategic management has focused on what strategy to employ and more lately on how strategists work in practice, but little attention has been paid to just where the skills and expertise come from in the first place.

I would value your input into this research and invite you to participate.

Participants and data collection

The information I am keen to collect for this research is the history, experiences, perspectives and accounts of individuals who have considerable experience as strategists. In addition I'm interested in your views about what makes an 'outstanding strategist'. A problem researching strategists in a business context is working out exactly who is a strategist? Whilst it may sound straight forward, there is no formal 'strategy qualification', as there is a qualification for accountants and lawyers and this makes it more complex. Therefore for this research, participants are being identified primarily by reputation through discussions held with individuals in the business community.

It is planned to interview approximately 25 people which should provide sufficiently detailed information to allow an overall picture to be developed about where strategists commonly or typically gain their knowledge and experience. Interviews, which will last approximately 1 to 1½, will take place at a time and location convenient to you. In addition a small amount of time will be required to get your comments and thoughts on what an outstanding strategist looks like from the collective perspective.



Data Management

The data from this research will be used for:

1. PhD thesis
2. Academic research papers and presentations
3. A summary report to be circulated to all interested participants.

Interviews are planned to be recorded and partially transcribed for data analysis. As indicated, a summary of the key points from the interview will be sent back to enable you to confirm that the essence of the interview has been captured accurately. This reduces the possibility of the researcher incorrectly interpreting aspects of the interview.

The recordings will be stored in a secure location and only the researcher and supervisors will have access. Individual names and any titles will not be included in reports and every endeavor will be made to ensure any quotes included do not reveal the identity of the person quoted.

Participant's Rights

You are under no obligation to accept this invitation. If you decide to participate, you have the right to:

- decline to answer any particular question;
- withdraw from the study at your discretion;
- ask any questions about the study at any time during participation;
- provide information on the understanding that your name will not be used unless you give permission to the researcher;
- be given access to a summary of the project findings when it is concluded;
- ask for the recorder to be turned off at any time during the interview.

I hope you will be able to help with this important and interesting area of research. Please contact myself or either two supervisors if you would like further information or to discuss any aspects of this research.

Roger McEwan



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This project has been reviewed and approved by the Massey University Human Ethics Committee: Southern B, Application 11/79. If you have any concerns about the conduct of this research, please contact Dr Nathan Matthews, Acting Chair, Massey University Human Ethics Committee: Southern B, telephone 06 350 5799 x 8729, email humanethicsouthb@massey.ac.nz

APPENDIX 2 – SEMI STRUCTURED INTERVIEW GUIDE

What am I trying to achieve?

- Introduce myself professional and engagingly to the participant/strategist.
- Relax the participant so they can speak freely.
- Identify and understand the primary sources of knowledge, experiences and skills that strategists use in their strategic thinking and decision making? Therefore;
 - *What constitutes a competent strategic management cognitive framework?*
 - *What are the key aspects that have formed and shaped their views and thinking over time?*
 - *How are these skills used during strategic thinking and decision making?*
- Identify the characteristics and behaviours of 'outstanding' strategists.
 - *Gain insight into what strategists identify as characteristics they would expect to see in an outstanding strategist*
- All questions are a guide, tease out the key information!

General/Warm up

Use topical areas of personal interest to start the interview, if you haven't got any use these ones...

- Before we dive into some of the specific areas I'm interested in your general perceptions about how well or otherwise organisations actually perform strategy?
- How much do you think strategy is more lead by individuals versus perhaps an organisations process?
- When you think about strategy, where would you place yourself on a line if one pole was practitioner and the other pole was academic?

Opening the interview

- Introduce research (clear overview to sell what it is and why it is important)
 - *As you may be aware I am currently both a business consultant and working towards a PhD at Massey. The focus of my research (and my main interest as a consultant as well) is on strategic thinking and decision making. To be more specific, to determine how and where strategists acquire the knowledge and skills that they use in strategic thinking and decision making. The majority of research in strategic management has focused on what strategy to employ and more lately on how strategists work in practice, but little attention has been paid to just where the skills and expertise come from in the first place. I am hoping that this research will provide insight into this area and influence how we think about teaching and more importantly learning about strategy.*
- Take participant through the information sheet (if not done previously)
- Consent form (if not done previously)
- Rationale for tape recording
- Does the participant have any questions prior to starting?

Interview questions – Strategists' cognitive framework

- Okay so turning to knowledge, experience, background regarding strategy I'd like to start at the high level and then drill down if that's okay...

- What are the significant occurrences (events, incidents, issues) regarding strategy that made a marked impression on you and helped shaped the way you think about and approach strategy? (Aim to get at least 3)
 - *When did these occur (age, career stage)?*
 - *What was important about this?*
 - *What was the result?*
- What formal training or education have you had in strategy?
 - *When did this occur (age, career stage)?*
 - *How useful did you find it?*
- Were there any individuals you came across that were influential in your thinking?
 - *Did you have anything like a mentor relationship through education/training?*
- How much of a role has strategic management literature played in shaping your strategic management thinking?
 - *Particular books, journal articles, magazines?*
 - *Do you have a library of strategy books? Which ones do you refer to often if any?*
 - *Websites that you regularly visit?*
 - *Do you belong to any associations or groups that focus on strategy?*
- What do you read today?
- How important has been learning by practicing strategy been for you?
 - *Were there any particular roles that were particularly influential?*
 - *What was involved? How long?*
- Have any individuals that you have worked with been influential in shaping your strategic management thinking?
- How do you maintain or improve your strategic thinking and decision making ability?
- If someone was just starting out on a strategy career path what advice would you give them?

Interview questions – Outstanding strategist

Changing tack slightly if you were to think of what makes an 'outstanding strategist'.

- What characteristics would a person have for you to think of them as an 'outstanding strategist'?
 - *Prompt for: behaviours, communication style, actions*
- Is there anyone who sticks out in your mind as being an outstanding strategist?
 - *If not – then who would be the best you have come across*
 - *Prompt: how did they behave, what made you get that impression*

Interview wind up

- Thank you!!!
- Are there people that come to mind who you think I should/could interview? Would you mind if I let them know that you suggested them?
- What is happening next

APPENDIX 3 – NODE CONTENT 1

Practice origins\education\tertiary education\content

The information contained in this appendix has been taken directly from Nvivo and there has been no attempt has been made to edit the text for presentation. All aspects that may identify participants have been concealed.

<Internals\ [REDACTED] 1 Oct 2012> - § 9 references coded

Reference 1 - 2.99% Coverage

[REDACTED] funded my MBA through [REDACTED], 24 years ago now, I still owe him.

Reference 2 - 0.79% Coverage

MBA's were worth something then. I didn't do it for any real business reason. I had 2 drivers for this whole thing, 1 was I wanted to get some king of, I guess, validation for all the experience I'd gained. I was probably just turning 30 then so I thought I was an old man but I'd learnt heaps.

Reference 3 - 1.10% Coverage

(So the MBA itself?) No that's when I realised that I already knew an awful lot of these things cause. That was why I was intrigued by your question as to where did the genesis really start and it's such a gradual progression that I can't honestly say where things happened but all I know when I did the MBA and we started to look at formal strategic frameworks and the different models you can use to help strategic thought, which were pretty rudimentary, SWOT and PESTE analysis was pushing the boundaries back then, that I realised that I actually knew an awful lot of that stuff and a lot of the questions that I still ask today, what does winning look like? What success looks like? Were questions that I asked I guess relatively intuitively early on in life.

Reference 4 - 2.10% Coverage

I learnt, I guess to validate what I'd already got, but I also learnt a lot more about myself, many lessons that I have to re-learn on a regular basis, some of which I'm still re-learning now

Reference 5 - 0.46% Coverage

How much value do the structured strategic processes add in terms of the tuition but secondly I suspect if you go back and really dig, the success presents itself to prepared minds. So there's got to be that hunger for something

Reference 6 - 1.97% Coverage

It would be interesting also to check, you go back through the original career choices of the participants, because I did engineering, it was quite an analytical place to start, so I did learn to think about foundations and about structures and about is the structure fit for purpose will it support the weight you're going to place on it? Doesn't matter whether you think about physical structures or philosophical structure you still have to do the same test, are the foundations adequate and is the structure going to support the weight. Even simple basic tests like that make a difference, there's nothing wise about that it's just common sense

Reference 7 - 1.87% Coverage

There is no question the MBA helped just because it gave me some structure around stuff which had been very, very eclectic or drawn from eclectic sources. But I suppose having thought it through in this discussion, that book around having a very clear view of what success looks like because that was one of the pivotal pieces. In the MBA we did a process management piece and we read a book called 'The Goal'. The notion that you often have to sub optimise parts in order to optimise the whole was another aha moment for me and it's so easy and it comes back to the lens used.

Reference 8 - 4.13% Coverage

[The MBA] gave me some of it, it gave me validation and that was one of the key things, that what I had learnt actually did all fit into a framework. It probably gave me a little bit more structure than I'd had before but it also, by exposing me to a whole bunch of quite brilliant people. Some of the [REDACTED] lecturers were completely brilliant (that seems rare). We had a few, [REDACTED] who did the marketing, [REDACTED], maybe HR.

Reference 9 - 4.13% Coverage

I did learn useful stuff from the MBA, I suppose it gave a framework to hang a lot of the things I learnt before and I could then identify the gaps so I could hang other things on.

<Internals\ [REDACTED] 6 Sept 2012 part 1> - § 1 reference coded

Reference 1 - 6.32% Coverage

I worked for a bit between times and then I did an arts degree which, as I said, I was not a stellar student, but for the amount of effort I put in I still think it is one of the best degrees for effort.

<Internals\ [REDACTED] 6 Sept 2012 part 2> - § 3 reference coded

Reference 1 - 0.03% Coverage

I liked politics and sociology - closest to management was dynamics of groups. No economics or accounting. Uni provides a wide range of views, you can't be a zealot. It is an opportunity.

Reference 2 - 1.65% Coverage

I don't know whether it's still true in Australia and New Zealand we tend to have our MBA students who are older than in the USA. So people did have 5-10-15 years of life and work experience and I've observed that they got better value from their MBA because they had a base on which to relate it. A lot of the American MBA's I've worked with they're 27 and they've only ever worked at McDonalds and 2 years with McKinsey or PWC and they know everything but they haven't actually tested any of their knowledge.

Reference 3 - 1.38% Coverage

When I was learning political science as an undergrad in [REDACTED], I did that for 3 years and we never once had a visiting speaker but in the other subjects they get someone from the education department to come and talk to us. We were 3 kms from parliament house, the people in this room were senior public servants, we've got the high court down the road. This is where the country is run from and we never got once any of those people, the people who were actually doing the political science we were never exposed to that and I always thought it was because the academics wanted to teach us the theory and not worry too much about how that theory applied.

<Internals\\[REDACTED] 6 Sept 2012> - § 6 references coded

Reference 1 - 2.44% Coverage

I guess some of it would come from there (masters in Geography?) I suppose geography being quite a holistic subject in a way and so you get to touch on social, economic, environmental aspects. Also when I did my masters, looking at geographical thought and different philosophical thoughts, writers in terms of economic perspective on the world etc. That giving you different lens on how you look at things

Reference 2 - 2.44% Coverage

I think that geography does give you quite a good basis for doing that, not that I would have thought that when I was taking the degree but in reflection.

Reference 3 - 0.51% Coverage

I think it's about what makes cities work or what makes economies work and so therefore that's quite strategic in itself, what's things influence growth or decline.

Reference 4 - 0.39% Coverage

I suppose enlightenment probably was back in my masters where I was taught to look at the world in a different way and from different perspectives.

Reference 5 - 1.06% Coverage

Haven't done an MBA. Occasionally I think it would be interesting to do one or two papers in management. It doesn't appeal to me because I haven't seen myself as a business person in that sense.

Reference 6 - 2.60% Coverage

I was taught good analytical skills so I know how to research things and seek out data or ask questions I guess. I think being able to ask deep questions is quite important. I suppose my academic training taught me that. Some of it, is it intuitive? I don't know, it's hard to know the fine line between being intuitive or just because you've kind of learnt how to do something over a, long period of time, it seems intuitive.

<Internals\ [REDACTED] 16 Oct 2012> - § 5 references coded

Reference 1 - 6.36% Coverage

The first decision I made as an adult was to go to Uni in Southern California about 10 miles away from where my parents grew up which just killed them because they had taken me out of that environment and the first thing I did was to go back to it. But I went to a small liberal arts schools which was limited at 900 students called [REDACTED] [REDACTED] which used to be a men's school. (...) My largest class was about 18 people

Reference 2 - 6.36% Coverage

At Uni I went to get a degree in politics, I came as an active Democrat and it was a right wing conservative school that developed the economic policy for [REDACTED]. I got really beat up in my freshman year (lots of debates). I don't know why I took an accounting course but I threw it in there for variety but the professor was excellent and so I took another accounting course and then I had enough to swing another degree on so I was a political science, accounting major

Reference 3 - 6.36% Coverage

I got serious about the accounting so the summer after my sophomore year I did an internship in accounting back in [REDACTED] which was brilliant because it got me up to [REDACTED] and I got to see a lot of [REDACTED] that I hadn't seen before. [REDACTED] is right up north (I've not heard of it) of the Arctic Circle. I learned also that accounting was not something I wanted to do as a career because it was just mechanical applying rules and so I added the economics major then, so I graduated with a degree in economics and accounting in govt.

Reference 4 - 0.92% Coverage

I did no strategy courses in my undergrad because they didn't offer any, I did an organisational psychology, I did very much like an MBA cause when I went back for my masters of management at Kellogg, that was a waste of 2 years, I didn't learn, I mean everything I did in my undergrad, I pretty much repeated for my masters of management.

Reference 5 - 3.17% Coverage

I would have said, I had classic business training, I was your consultant who went through your consultant training mill because I was at a school that turned out lots of

consultants, we either turned out consultants or congressional aides. So we sent lots to BCG, McKinsey or maybe Bain. But when I think about the training that they gave me, I had statistics, economics, business. I didn't have a lot of strategy, I got more strategy from the masters of management but they weren't formal strategy courses in my undergrad

<Internals\\[REDACTED] 2 Oct 2012> - § 5 references coded

Reference 1 - 0.36% Coverage

my background was a techo and I got to a point when I decided I needed a degree so it was either an engineering degree or a business degree and this was the late 80's early 90's. So I ran away and did an MBA. I went into an MBA thinking that if I was going to be successful I need to understand finance and technology.

Reference 2 - 2.21% Coverage

I popped out the end of my MBA, it completely transformed my view of the world. I discovered that to be successful it wasn't about technology and finance as I thought, it was all about people. The key to building a successful business and successful career was all about people and motivating people.

Reference 3 - 0.74% Coverage

I felt that I had got to a point, did you have an undergrad degree? (Yes, code cutter). I felt the world was divided into those who had degrees and those who didn't and I think the only people who think that way are people that don't have degrees. So I felt a need, I had been expelled from [REDACTED], to get a degree to prove myself and business seemed more attractive than engineering.

Reference 4 - 0.96% Coverage

The thing the MBA, it gave me the confidence to attack any business problem. It forces you into all these HR, but you've got to do a HR paper so it kind of forces you into all these areas that you normally wouldn't get into and then I actually can solve problems I these areas. So it gives you that confidence. And I guess the other thing it gave me the confidence to trust my guts which is kind of interesting.

Reference 5 - 0.74% Coverage

Don't knock what the Uni's are teaching. I for one would not be where I am without that foundation. Now whether or not I accept everything I've learnt or not, I really think that foundation is really important, it's only one brick in a wall, it's not the total solution, you're never going, this business shit ain't a checklist of 10 magic points but this stuff really, really important. I kind of think the case study stuff is really important and I think the idea of open ended case studies is even more important.

<Internals\ [REDACTED] 17 Sept 2012> - § 1 reference coded

Reference 1 - 1.11% Coverage

No it's geography. And it's human geography so I actually signed up to uni to be a [REDACTED] [REDACTED] which I just realised is the most boringest thing, I don't think I lasted 2 lectures before I decided that was not for me. I went to uni as an adult student, I'd left school earlier, as soon as I could to go into the workforce and I'd always been keen to work and then went back to uni later on which gives you a slightly different perspective.

<Internals\ [REDACTED] 11 Sept 2012> - § 8 references coded

Reference 1 - 0.64% Coverage

I did an electrical engineering degree at Canterbury, worked as an engineer in the electricity industry

Reference 2 - 0.64% Coverage

did a business studies degree over a long period of time. Started in Otago, did something in [REDACTED] and finally finished it through [REDACTED].

Reference 3 - 1.88% Coverage

I'd been at [REDACTED] for 8 years and we'd been through a lot of growth there through the irrigation boom and it was the start of the time when organisations were moving from being local govt utilities through to commercial entities, more pressure on marketing and the commercial aspects. So I got really interested in that and that was the time I was doing my BBS as well.

Reference 4 - 0.57% Coverage

I think I started doing the BBS just because I wanted to broaden my skill base so I'd worked for 3 years in a graduate engineer role doing substation design and line design and all those fun things.

Reference 5 - 1.06% Coverage

I guess an engineering degree gives you an element of systems anyway, particularly an electrical degree where you are doing control theory and feedback loops and all those sort of things. Designing a project is a bit like designing a business plan, you've got to start with what you want to achieve at the end and work through a series of logical steps to plan it, organise it and do it. The disciplines are not dissimilar.

Reference 6 - 1.18% Coverage

you broaden, you pick up things through your degree but you generate interest, you read, probably some chi texts going around, probably the Peter Drucker days. (there were key texts?). You tended to pick up different things from different people I suppose at the end of the day it is all just variations on a theme.

Reference 7 - 1.11% Coverage

And that would have been about the time I picked back up the business study degree and I was doing some management papers. I did a full year in 78 at [REDACTED] and then we moved to [REDACTED] and I did a couple of papers there and then probably dropped it for 7/8 years. Picked it up again 87/88 and finally finished in about 91.

Reference 8 - 0.99% Coverage

I think the first stuff gave me a basic grounding, like basic accounting, economics, management, ops research all your analytical stuff which for an engineer was like a pig in mud. So I had that initial grounding and it was probably quite good to leave the rest of it until then because it gave me a bit more theoretical base to some of the stuff I was trying to do.

<Internals\ [REDACTED] 3 Oct 2012> - § 4 references coded

Reference 1 - 0.91% Coverage

Straight from school to Uni, I was interested in science, I enjoyed science at school. Did an honours degree in botany.

Reference 2 - 1.80% Coverage

I guess back then you didn't do mixed science and management.

Reference 3 - 3.57% Coverage

In the late 80's I started doing an MBA at ██████████, part-time. 88 probably (when MBAs meant something as one person said) and then I got a ██████ study award and went fulltime to ██████ Uni and finished my MBA, 89-90. That was probably my first formal management, strategy training.

Reference 4 - 1.95% Coverage

Without an MBA I don't think I'd be where I am now but how much of that is the specifics of what you learn in an MBA and how much is it the credibility for those first steps into a higher management role.

<Internals\██████████ 20 Sept 2012 part1> - § 3 references coded

Reference 1 - 0.21% Coverage

Absolutely. You went to school as we all did at University and we learnt the Porter model and we learnt the Boston Consulting group and we learnt the whatever.

Reference 2 - 0.33% Coverage

More like, the focus mainly around business management and marketing. I kind of knew all of that because I'd run businesses so it was kind of slightly boring.

Reference 3 - 2.27% Coverage

basically in school I was self-employed. I did some in the late 80's but it was around the 90's that I went back and did that business and marketing.

<Internals\██████████ 30 August 2012> - § 5 references coded

Reference 1 - 0.49% Coverage

I started at Victoria and I did a couple of courses in the first year. I didn't take it seriously at all but I did parts of political science

Reference 2 - 0.85% Coverage

I was being pushed in towards accounting

Reference 3 - 1.23% Coverage

I was actually quite disappointed in the lecturers and even the tutors. I thought I almost knew more than they did from just having sat and thought about the lectures and things like that. I don't mean in an arrogant way but it was just how I felt, I thought I'm not going to learn anything here this is... I can learn this stuff just by reading a book and save myself a year. So why do I need to go through the rest of the bullshit.

Reference 4 - 0.36% Coverage

I did well in accounting at school, I found it quite easy but the thought of doing that for the rest of my life was get the razor blades.....

Reference 5 - 1.72% Coverage

I did some study by correspondence; I did a diploma of management through NZIM. Again it didn't enjoy and I felt I needed to do it to satisfy other people rather than myself. The courses, the individual courses were designed for 180 hours study and the most I spent was 38 hours because I figured out the system and the system was there were 10 chapters and you'd get an assignment on 2 of the 3 of the first ones and the third one was going to be in the exam. So I just learned the formula and I didn't really learn anything and I got A's and B's so I knew the stuff but that material was just...

<Internals\ [REDACTED] 19 Sept 2012> - § 7 references coded

Reference 1 - 1.08% Coverage

At varsity, I did a BBS at [REDACTED] and marketing (did that give you a leg up into thinking). Absolutely, that gives you your sense of discipline about learning and it also gives you the tick to dance to get into the good companies. I did honours which was actually I think a way of really solidifying the learning.

Reference 2 - 0.92% Coverage

Doing the BBS in terms of giving me frameworks for strategic thinking? Was it valuable? It was valuable in terms of giving me a questioning mind and I think it was valuable in giving me the confidence that actually I could learn and pick up stuff that I didn't know before and give stuff a go. I think it gives you to a degree the disciplines to be able to train your mind to be able to apply, that's what it gave me as opposed to anything specifically around strategy, if I'm honest.

Reference 3 - 2.64% Coverage

Other than understanding (Wharton) that the American executive education programme is split their head open, pull it all out and then repack it.

Reference 4 - 2.64% Coverage

██████ really helped in terms of networks and it really helped my confidence actually. I could step up, because for New Zealanders a lot of us think we are at the back end of the world and all those smart folks are in America and Europe. What it actually gave me in that room with those CE's and other so called heavy weights from other big companies, I could foot it with any of these people, any day of the week in terms of my thinking, my strategic thinking. That is what it gave me. It was a huge gift and I think for organisations and I say to people, look you send someone to ██████ it's going to cost you \$100K but I tell you what you'll get that back in bucket loads because the people coming back in terms of the confidence they have around as a New Zealander to be able to foot it with those people and they can pick up the phone and dial someone who's the CFO of IBM and go - hey what do you reckon about this? So it's your networks as well.

Reference 5 - 1.50% Coverage

For me it was confidence and networks. I occasionally go back and refer to the books but the more is, in Maori it's called Ngako, it's the guts. What's the real context of it, what's the real thing and that's what it gave me confidence and the other thing, just pick a framework...

Reference 6 - 1.11% Coverage

Yeah, got the Porters and the Mintzbergs and all that and ██████ again reinforced that and then the other training institute you get that stuff. I think you need to be abreast of that. One for credibility and two, some of that stuff is bloody good. Some of that is actually sustained because it is simple and it is good. You need to be current and you also need to know what's the good juice which has been around for many years.

Reference 7 - 3.03% Coverage

I think you can teach the principles of good strategic thinking and good strategic frameworks and how to allow you to come out of the hole and above it. I think it would be dangerous to go that this is just like tax accounting or audit, I think it's much greater

than that but the danger with that, when I was taught to do marketing, marketing was everything, that's the ultimate context because that's the way my lecturers thought about it, well of course I don't think that anymore. It's important but it's not the most important. I think in your language you've got to be careful that don't just therefore strategy is the most important thing because it's not either. It's an important piece but there's a whole lot of other things which need to support any great company. They've got to be good at strategy, they've also got to be good at financial planning, having a great balance sheet that's geared appropriately, hr, culture. I think the only thing that sits above in my world is culture, but that's my personal view.

<Internals\\[REDACTED] 4 Oct 2012 part1> - § 2 references coded

Reference 1 - 5.82% Coverage

Did a degree part time at [REDACTED] (management?) I did a bachelor of Commerce in administration and majored in accounting.

Reference 2 - 2.72% Coverage

The other thing I got out of the degree was a confidence, the main reason I started it in the first place was that lack of confidence that I had.

<Internals\\[REDACTED] 4 Oct 2012 part2> - § 2 references coded

Reference 1 - 1.21% Coverage

Technically (the MBA) is very good but practically it's at to a lower level. (I've got an MB) [REDACTED] used to say mostly bloody awful. I got a lot out of [REDACTED] stuff as she went along I got stuff that I thought was really, really good. Overlaid on my knowledge base but I think you're right, it needs to build on something that's already there and I think they need to be far more selective about who they put in it. In fact you're getting the cream and adding to their capability rather than creating a lot more people who don't actually have anything to offer but have got a qualification.

<Internals\\[REDACTED] 9 August 2012> - § 5 references coded

Reference 1 - 2.15% Coverage

at Victoria. So social work generally gives you the ability to, aspects of social work are around systems thinking so I was attracted to systems thinking and systems thinking is a good place for strategy development.

Reference 2 - 3.10% Coverage

Social work is quite good in you do a in certain courses you do quite a bit of systems analysis, how systems... In actual fact (I interrupt). The stuff that I was drawn to more than the interpersonal counselling side of things or understanding human behaviour I was more interested in the what became fashionable in the 80s 90s, 80s, was form of thinking called structural analysis. So almost a Marxist approach to understanding power and politics in societies. So you begin to determine who are the change leaders who are the business leaders or who are the reform leaders and where the economic wealth is and the people's wealth is and so you start to build a picture of what your society looks like from a power and politics perspective. So structural analysis was a tool to understand that. Came out of South America, in the education setting, Freire, Paulo Pedagogy of education which then became the pedagogy of the oppressed. So that sort of stuff was an aspect of social work training and development and so those techniques can be applied to a strategic framework as well quite easily.

So there was aspects that weren't labelled strategy or strategic thinking or anything like that but they had the similar disciplines like a PESTE analysis, a fore runner to a PESTE analysis.

Reference 3 - 1.16% Coverage

to move from there to a structured strategic process around a PESTE analysis and the next things you do was very much the same process but different language from structural analysis or systems thinking or numerous things in the broader social work way. So there was natural fit for me in the way I thought and the way I expressed myself with social work and then when I became more aware of strategic process there was a natural fit again.

Reference 4 - 4.08% Coverage

It opened doors to knowledge you didn't previously have. The thing with strategy is less about the science and more about the art and what they teach is the science. What they don't teach the art of strategy, the art of the strategist. Strategos - at the art of the general so we've taken the general part of that definition and we've forgotten about the first part, which is the art. The practice, the doing it with others in a room, interactive strategic exercise. In the 5 years of postgraduate work I did one strategic exercise.

Reference 5 - 4.08% Coverage

Do an MBA, the postgrad thing I did was did exactly the same studies that the [REDACTED] MBA did, I didn't do the [REDACTED] MBA, probably didn't have enough money, exactly the same papers and what it didn't do it didn't have the order of the papers right so the final paper was an amalgam of strategy leadership and people. So that if you were going to be a GM or CEO or run your own business, pull everything together for you and you left the MBA saying that toolkit is actually complete. I got all this, this but with this paper I now know to use this now, and this tool in that situation and that didn't occur. Neither at [REDACTED] or, I didn't complete at [REDACTED], I was bored being taught HR by someone who ran a dairy...

<Internals\ [REDACTED] 4 Sept 2012> - § 7 references coded

Reference 1 - 0.54% Coverage

I was there working on these big capital projects I started to think accountants were idiots or I was cause I didn't understand why projects didn't stack up and other ones did. I didn't understand much about the thinking and so I decided I would go to Uni and get an accounting degree. I wanted to understand what they appeared to understand.

Reference 2 - 1.28% Coverage

I decided that those kind of by rout numbers didn't mean anything to me, didn't make any sense to me at all. But I continued doing finance because I was interested in the bigger aspects of numbers. What's a dollar worth to you tomorrow and the day after and if we build this big thing does it earn enough money to pay us back. That kind of thing. And I suppose that is the starting of the strategic thing

Reference 3 - 3.91% Coverage

I think it's more to do with that than what I learned at Uni other than the people I rubbed shoulders with.

Reference 4 - 0.96% Coverage

I had to do a project in my final year of technical studies. So even though I was just a technician level student and so I could have done something quite mundane and this was in the day before these things were really main stream. My study was in twin cavity [REDACTED] lasing devices. So I have a tendency to dig deep cause

we are talking someone in their early twenties with no engineering degree wanting to know how these worked and I'm not sure whether my tutors would have understood it.

Reference 5 - 3.19% Coverage

I did a meta-analysis in the area I had been involved in nobody had used the technique and I was interested in how this technique works. I sort of taught myself from books how to do it and that study has been a few places and been the foundation for other people's work going forward. I did for my masters I did another technique that was in its emerging stages, there wasn't even a text book on it, I had to draft the first ever text to be written in the world as my manual on how to do this and some software with no operating manual because it was that new it had been written but hadn't documented. The technique was structural equation modelling which is very common now but wasn't then.

Reference 6 - 0.14% Coverage

avoided management papers like the plague.

Reference 7 - 2.31% Coverage

Basically in marketing one of the big problems not very much of what's done or suggested to be done in the text books has much empirical evidence. Underneath that was the idea that if you thought about market research in reverse that is what is the decision you need to make and you build the research back from there. Then you get a good understanding of how to do things. Start with the decision you want to make and work backwards. So that is one of the forming frameworks and that doesn't come from any text books, it is very obscure paper by Andreasen and it's called reverse [backward] market research, is the theory and I think it is HBR so it's not even a heavy duty one. But one of the take outs I got from that, my personal extrapolation from what the leanings around there was if you can't measure it don't do it. And that means you think harder about your decisions because you know that someone's is going to be watching the results because they are measurable and that has a little bit to do with it as well. So there are those deep foundational things and they terrify me because exposing myself to failure. And I've been involved with some of the biggest cock-ups that have ever happened. I've really learnt some interesting stuff.

<Internals\ [REDACTED] 16 Oct 2012> - § 8 references coded [9.94% Coverage]

Reference 1 - 1.16% Coverage

at Uni I did mathematical psychology and in that you get exposed to game theory because you're dealing with normative and descriptive human behaviour and building mathematical models of that so game theory gives you the normative behaviour

Reference 2 - 0.49% Coverage

[REDACTED]. Game theory is a mathematical theory and it fits within economics, mathematics and psychology.

Reference 3 - 2.90% Coverage

I was interested in my MathPsych in decision analysis so I went to the [REDACTED] [REDACTED] cause there was a guy there who was an expert in decision theory from Harvard and I said I want to do a PhD with you and he said that would be great except I'm going back to Harvard. My then wife was a [REDACTED] student there and I was sort of stuck there for another couple of years in Sydney so I ended up enrolling for an MBA at [REDACTED]. In that MBA, I did well I got prizes for topping the course in both years and was also exposed to a strategy course which was taught by a guy who had been the leader of the BCG office in [REDACTED] who had a view of strategy was essentially competitive as the BCG approach to strategy is

Reference 4 - 2.90% Coverage

So I did that course and he knew some guys who were running a strategy boutique that had been set up as a spinoff of [REDACTED] in Sydney. He gave them a heads up and said you should have a look at this guy and they hired me. So I found myself in a top level strategy management consultancy, straight out of business school as a lot of people to.

Reference 5 - 1.69% Coverage

Then getting into Bayesian statistics as a tool for decision making. I did a course at [REDACTED] in Bayesian statistics so I was kind of into that non-classical decision analysis.

Reference 6 - 1.14% Coverage

I left as a 19 year old undergrad I got a job at the dept. of social welfare working as a researcher and I was there for about 3 years, did my masters and honours while I was there. It wasn't very strategic but it was pure research and that's where I learnt statistics, never learnt it at Uni I learned it on the job. So that kind of reverberates back when you do the [REDACTED] stuff cause its Economic, social and environmental, I worked as a social scientist when I was consulting to academics...

Reference 7 - 2.56% Coverage

The MBA is one 6 month course and you're doing 4 courses in the semester, so you learn a few basics. Mostly you get the idea about the difference between success and improvement. The difficulty is a lot of people, even people who call themselves strategists think that if they can improve something that's the same as success but if I've got a lousy business and I implement 3 improvements I can still have a lousy business.

Reference 8 - 2.56% Coverage

I learnt from business school, for the first time was to think about business in a relative sense as opposed to an absolute sense.

<Internals\ [REDACTED] 7 Sept 2012> - § 3 references coded

Reference 1 - 2.04% Coverage

If you look at my grades at Uni, I'm a plant biochemist with a major in human physiology. It's not your typical background but there is something that they saw in me which I still to this day don't know what it is.

Reference 2 - 1.41% Coverage

So I've got a postgrad diploma in biochemistry. I did basically a DipSci in rat casein. My research was okay, wasn't fantastic it was okay. I wasn't working out ratio..... for casein which in those days was quite radical, today it's routine as a test method. Then I started working on a masters in science working on an enzyme called [REDACTED] which is for cholesterol manufacture in plants. Did that for a couple of years and really just wasn't for me then. Went to work for the dairy industry in R&D.

Reference 3 - 1.35% Coverage

University just gave me the opportunity to delve in different areas, I don't think it shaped a lot of the business side.

APPENDIX 4 – NODE CONTENT 2

Formulation and Implementation

The information contained in this appendix has been taken directly from Nvivo and there has been no attempt has been made to edit the text for presentation. All aspects that may identify participants have been concealed.

<Internals\ [REDACTED] 1 Oct 2012> - § 4 references coded

Reference 1 - 7.65% Coverage

You've got to know where there is... Lots of pain, failure, and go through that process again. Some keep going out there confusing motion with progress, some govt depts keep reinventing there. [REDACTED] said good businesses, sports teams, performers in life generally operate on a much, much narrower band width. He drew that kind of thing, each course correction is minor and you go looking for the signs as a feedback mechanism rather than a failure mechanism.

Reference 2 - 7.65% Coverage

I learnt more from [REDACTED] around implementation of strategy and taking grandiose strategies and turning them into doable things, than I learnt from anyone else.

Reference 3 - 1.30% Coverage

I'm quite an interfering person so I hate sitting on the side lines so in terms of primary sectors strategies I lead the [REDACTED] marketing strategy, the NZ [REDACTED] strategy and the NZ [REDACTED] strategy. In all these I'm still an interfering person, so I'm now chair of [REDACTED] NZ so I can actually find out why no one's implemented the strategy properly.

Reference 4 - 1.30% Coverage

It all requires significant behavioural change but once I socialised that I'm going to be quite hands on because I don't like sitting back and watching and I don't, there may be a role for a strategist who doesn't care about implementation but I don't think that's professionally and socially responsible.

<Internals\ [REDACTED] 6 Sept 2012 part 2> - § 2 references coded

Reference 1 - 2.11% Coverage

A lot of times people have said - what's your evaluation strategy? I have two questions - did it happen and did it work? I can remember in the late 80's early 90's when NZ was doing a lot of restructuring work and say to our potential clients, we not only want to bid for the restructuring but for the implementation because just going in and talking to people and coming up with a new organisational chart is actually quite easy if you've done it a few times but getting in with the people and making the structure work and modifying it when it needs modifying. I think that's a very different set of skills which might be different from strategy but the people who I admire and might call strategists are interested in the physical reality. Not just coming up with the best plan.

Reference 2 - 5.34% Coverage

I went along when they opened it we were all very proud and friends of ours said we've been talking about a Framers' market for 20 years - and I said - exactly. They've been talking about it for 20 years, she and a few of her friends got together and made it happen and this woman 12 months before thought of herself as just a housewife has learnt all these skills in effectively setting up a business, all the legal stuff, OSH, insurances, much more complicated than anything I've ever set up. It's the portability, she was able to use the skills and the obvious intelligence and hard work to make something happen, to implement a strategy while other people just sat around over dinner and said why isn't there a Farmers market? Other people like the pig farmer there all now involved in it. So it's become this major initiative which is having impact across the whole state of [REDACTED] because one person said there isn't something, I think there should be something and I'm going to try and make that happen.

<Internals\ [REDACTED] 6 Sept 2012> - § 5 references coded

Reference 1 - 2.48% Coverage

I'm not a big believer in strategic plans. I mean we do have a strategic plan, all organisations do but I don't think being strategic isn't about setting a goal and working your way towards it like that because the world isn't that linear and it isn't that straight forward. It's much more about reading signals and certainly thinking ahead and wanting to do the best in whatever it is you're in, education or business or whatever. But it's being able to adapt while things change.

Reference 2 - 4.02% Coverage

I think probably on the whole it's true, to be a strategist and have people skills but I think that depends on the business you are in to a degree. So I've tended to be in big organisations where I've had to deal with multiple stakeholders and you do need good people skills there. A, to gather information and issues but, also to be getting your strategy out there and getting it understood so you need both those things really.

Reference 3 - 2.99% Coverage

my experience would be if you're purely in the stratosphere the strategic part and the vision then quite possibly you're not going to see your vision or your strategy emerge because the day to day or the business as usual, unless you've got an implementation team that's brought into that it's pretty hard to keep it going.

Reference 4 - 2.99% Coverage

where we've had a particular goal, strategy we've been pursuing and I've backed out of it and it's fallen over, or my teams backed out of it and it's fallen over. And I can think of twice where we've gone back in to pick it up and make sure it's happened. So which doesn't mean to say you do all of the implementation yourself but I think keeping a link to it and asking questions about progress.

Reference 5 - 1.06% Coverage

I can provide I guess the motivation, some resources, some of the stakeholder support. Those sorts of things around a project that maybe somebody right at the coalface can't do.

<Internals\ [REDACTED] 16 Oct 2012> - § 2 references coded

Reference 1 - 2.35% Coverage

That's terrible because it never gets communicated properly and what happens, I heard someone was interviewing for head of strategy for a position where they had actually set the strategy for the next 10 years, they really just needed to execute it, well you don't want a head of strategy you want a head of execution

Reference 2 - 2.35% Coverage

The strategy never gets communicated effectively, the people who develop the strategy had some insights along the way which didn't make it into the strategy document and they need to be around to recognise this is the opportunity to bring that idea back in as we're going through. The strategy is never exactly right when you roll it out to execute and so you need to modify when you execute. Having said that, the skills required to develop the proper strategy and the skills required to execute are very different. So you need some core team members to go from strategy to execution but you need a different team, like 30% of the people should be moved into execution so they provide the core and the understanding and they have the tough questions when people come back and go - what about this? And they need to be able to say, we didn't think of it.

<Internals\ \ [REDACTED] 2 Oct 2012> - § 2 references coded

Reference 1 - 3.25% Coverage

I think that I'm an example of that, a pretty average strategy - let's build a [REDACTED] [REDACTED] and compete with [REDACTED], well executed. It's about tactics, tactics really matter and execution really matters, the actual details of the strategy aren't quite so important.

Reference 2 - 14.30% Coverage

Strategy seems the big thing, execution becomes the massive thing...

<Internals\ \ [REDACTED] 17 Sept 2012> - § 1 reference coded

Reference 1 - 3.62% Coverage

then the question falls to them, well how are you going to execute on that strategy. No it has to be an internal competency and to me understanding the detail of it, you've just got to know what's real. I would say in most areas in our organisation, that I would have the most technical knowledge on how to do something, certainly in many of the key areas, there are some areas like patents where we've got some experts but I certainly know the basics otherwise you lack credibility but you also end up talking shit, it's just that simple.

<Internals\ [REDACTED] 11 Sept 2012> - § 3 references coded

Reference 1 - 0.35% Coverage

It was just a fairly standard sort of a process but I think out of that we actually came up with some good strategies and like all these things it's only as good as the implementation.

Reference 2 - 1.83% Coverage

I think part of it's intuitive but part of it's recognising how you actually measure your outcomes.

Reference 3 - 1.83% Coverage

Often people with the strategies but there's nothing tangible to measure them against and so how the hell do you know it. Whereas if I go into a business I'll ask what are the three or four key things that tell you whether you're doing well or not. 99/100 there are usually on 2/3 key things that you can measure that tell you whether you are doing well or not.

<Internals\ [REDACTED] - § 2 references coded

Reference 1 - 2.56% Coverage

In the 10 years you learn all those skills, some of which are not actually strategy but they're about managing relationships, teams. The biggest teams I've managed in strategy projects have had 50 people in them. How do you manage a team of 50 people to do a strategy project, it's not just about being a strategist. To do strategy, doing strategy isn't the same thing as knowing strategy. There are a lot of other skills that need to go around that and a lot of that 10 years is developing those other skills that complement it.

Reference 2 - 0.29% Coverage

The strategy stops with an outcome, if you don't get the outcome it's not really a strategy. Strategy that can't be implemented isn't a strategy.

<Internals\ [REDACTED] 3 Oct 2012> - § 1 reference coded

Reference 1 - 1.95% Coverage

I think one of my criticisms of the MBA which isn't a new criticism would be that it was very focused on sort of business process more than on the people side of effective

leadership of organisations. Effective strategy is as much about people, I mean it is about process but it's having the right process that you can engage key people in the organisation in the strategy, in the strategic paths and directions for the organisation because if you don't do that it doesn't matter how flash your strategic plan it's probably not going to take you far.

<Internals\ [REDACTED] 31 July 2012> - § 4 references coded [5.18% Coverage]

Reference 1 - 0.78% Coverage

Bringing it down to the low level sense making. And those are the sorts of things that strike me as being important in the strategy space. Being able to go from the high level being able to diagnose patterns and tensions in those patterns reasonably quickly and then translate them down to a low level, what does that mean to the person on the machine shop. How do you actually translate that in a meaningful way without being so grandiose and so high fluted - it is just a nonsense.

Reference 2 - 0.70% Coverage

How it gets played out and translated in practice is just a void, a grand canyon between high level conceptual plans and how the rubber meets the road. And doesn't need to be

Reference 3 - 2.39% Coverage

The army are really good they would have you out in the tussock, if you put your foot in your mouth. Did you get down on your guts in the tussock and if there is no grime on your tunic some crusty old bastard would get you. That gun group, or tank - you plucked that out of your arse, you're not going to put a soldier in that place - what does it mean for the soldier on the ground.

In [REDACTED] at staff college - syndicate head I'd drive everybody absolutely nuts sighting weapons by marking them on the ground so when we presented - feedback was absolutely fantastic between managing the tensions between if this was real what would mean for that soldier in that foxhole confronting the enemy at night. Is the hole in the right place? Armed well enough? Not just some throwaway line.

Reference 4 - 1.31% Coverage

So sitting with [REDACTED] for the last 30-45 minutes sitting with the CEO - so what does your back office look like? The one thing we need to make sure that you can present

that your back office can live with that or if you need more resources then to identify them and put them to the board. The Board have to be comfortable that your back office is fine and is going to support but you don't want them interfering, that sort of conversation. She said I didn't even think we were going to talk about that today. This once this thing is in place it all depends on your back office and you have to tell the Board whether it can deliver and who your people are. So we had lunch and met the people and shit this is really good.

<Internals\\[REDACTED] 20 Sept 2012 part1> - § 1 reference coded

Reference 1 - 3.05% Coverage

Because the ownership has to be on the people who make things happen otherwise it's not going to be sustainable or successful.

<Internals\\[REDACTED] 30 August 2012> - § 4 references coded

Reference 1 - 2.87% Coverage

What is there training going to be and how are we going to measure that

Reference 2 - 1.30% Coverage

I think the strategist needs to develop the how as part of the strategy and they need to be almost themselves and this that the strategist it is highly likely that you are not going to be that great at implementation, I'm shit at it (we share that in common), hate paper work. And I'll give you strategy and the vision and what have you but you must absolutely sit someone beside me

Reference 3 - 1.85% Coverage

You have to be able to see how it is going to be implemented and how you communicate that and tell people that have to do it.

Reference 4 - 1.85% Coverage

I was on a project team to develop a community foundation in [REDACTED]. We went through the whole process got all the trustees and gave them all the information said here you go and whole thing fell apart because we'd come with the vision and got it to the Board and trustees and they had no idea what to do with it. So I guess the strategist needs to be available and oversee because it might need tweaks depending on what you're doing with it.

<Internals\ [REDACTED] 19 Sept 2012> - § 1 reference coded

Reference 1 - 4.20% Coverage

From there I went and ran an operating company in Australia and then I got to apply that for real, all this sort of stuff and that was a real opportunity for me to go live with it. Because I think you can be in a place where you've got all these frameworks but unless you've seen it actually applied in an operating company. Then you can really test it live and so I ran [REDACTED] in Australia and then I was able to go Hmm, that one, that's really nice in theory but it has no practical use at all. To see how those bits can be applied

<Internals\ [REDACTED] 4 Oct 2012 part2> - § 3 references coded

Reference 1 - 4.57% Coverage

There's a whole lot of stuff around leadership like personal drive which I've always had in spades. Influence I've never really had I don't think and that's associated with that old uncertainty about where I come from and how good I really am or am not. So I don't know if I can answer that management question but strategically it ought to be relatively easy shouldn't it, to have a good strategy. To communicate to everyone you need to, how do you make people follow it, that's really the question (execution?). Executing it is I think the key task and I do know this stuff, it's like repetitive activity. Continually talking to people about it and so on.

Reference 2 - 0.61% Coverage

That leadership thing is intensely important in the whole execution of strategy

Reference 3 - 0.42% Coverage

Can't in the end take responsibility, particularly if you don't decide on it yourself as the top dog then it's going to be difficult for yourself to constantly support it when you're executing it. You'll always have that little wonder so you need to be involved.

<Internals\ [REDACTED] 9 August 2012> - § 2 references coded

Reference 1 - 1.59% Coverage

The framework was reasonably developed by then but what's the language when, what's the approach that would make a lot of sense. It was still quite mechanistic. But what it did for people, it joined the dots for people. They could see where we were going to go

in the next 6 - 12 months. They could see we were going in the 3 years' time they could see actually what the ultimate objective was and they could see the resources that were required to get it there. And they sat back and said this is marvellous if we can do half of this it will be a different place, a different organisation and it proved to be so.

Reference 2 - 2.45% Coverage

So for a lot of people you have to step it out in pretty concrete steps and be really clear about what their role is...

<Internals\ [REDACTED] 4 Sept 2012> - § 8 references coded

Reference 1 - 6.96% Coverage

Anyone, I'm a bit critical here, can find a problem but finding solutions, and that sounds a little bit like execution but it's not.

Reference 2 - 6.96% Coverage

I don't think you understand the difference between strategy and planning

Reference 3 - 1.24% Coverage

in the finish you need to have a framework of genuine strategic structure otherwise you get no output. It's all about spinning the wheels, it's all about the brilliant think tank idea but no execution.

Reference 4 - 3.98% Coverage

Strategy for me doesn't come easily because I think it is contingent, I think it is compromised, it is a bit of this and a bit of that. It is potentially a plan A and a plan B. It is and the web is proving this today, this is interesting, so when I talk about a plan I might vacillate between plan A and plan B. In the real world often you see management push through a singular idea because it is clear and crisp but then they jump ship or run before the outputs come. So there is never any real ownership, a lot of very successful, in inverted commas, people if you look back on their track record they've implemented but they haven't seen the results. If you looked at a longer time frame in management, people who have spent a bit more time around then you get a different sense of what works and doesn't work. Because execution is the good strategy. Having an idea and doing it quickly and sharply and everybody adopting it is not the same as success.

Reference 5 - 0.72% Coverage

██████████, ██████████ over the last 5 years. A whole range of things whereas you look at ██████████, a very professional strategies in NZ. Much more stable management, executes the plan through to fruition. Less tendency for people to come and go in a blaze of glory. So I think strategy is, and I'm a wee bit off the line with what strategy is here, strategy and execution

Reference 6 - 0.38% Coverage

That's right but I learnt about people. A lot of people have an arrogance about the importance of people and the different layers in organisations in the execution of strategy. So I'm quite interested in strategy and the execution not cause I see myself more as a tactician but strategy is only as good as its execution. It's all in the execution

Reference 7 - 1.84% Coverage

And mostly they don't have measurement in it. And they're not operationalised in such a way that you are measuring and testing. So you don't know if your strategy is performing.

Reference 8 - 1.84% Coverage

But it's scary, how does that fit into your bigger strategy and how are you measuring in fact if it is still going to be relevant going forward. There is a lot off bravery in adopting a strategy. But at the same time it is mitigated if you make it measured and you design it with the measuring capability built in.

<Internals\██████████ 21 Sept 2012> - § 2 references coded

Reference 1 - 0.93% Coverage

I don't know too many strategies that have been developed, executed and delivered the outcomes all from the corner office.

Reference 2 - 3.56% Coverage

I think that there's a lot of stuff that can be learnt particularly around strategic frameworks and methodology and process and the like but I have real doubts about execution. I've seen very many clever people who just haven't been able to execute to save themselves. Whereas I've seen people who I would regard as not necessarily top drawer strategically but just have that sense of determination, resilience to get things

done and generally it's because they have the ability to have high quality interactions with people.

<Internals\ [REDACTED] 7 Sept 2012> - § 2 references coded

Reference 1 - 1.19% Coverage

I mean if the strategy is obvious why hasn't it been executed and that's something I can't waste my time and get frustrated trying to help someone else develop a strategy and then watch it fall apart.

Reference 2 - 0.83% Coverage

To develop a strategy on its own I don't think is enough, I don't think you get enough buy in to execute a strategy.

APPENDIX 5 – INTERVIEW TRANSCRIPT

The information contained in this appendix has been taken directly from Nvivo and there has been no attempt has been made to edit the text for presentation. All aspects that may identify participants have been concealed.

Timespan	Content	Speaker
0:00.0 - 1:14.0	(Starting the interview in a loud café. The permission slip is discussed and signed). This is more like a conversation, what I'm interested in is strategy and strategists. The question I'm trying to find out more about how people develop the skills and techniques for strategic thinking and strategic planning. Where do they actually come from and to do that, this is really just a conversation to let you cast your mind back over your career regarding the notable or significant things that you think have made a real impact on how you see the world.	RJM
1:14.0 - 3:50.0	Okay, at school I never gave any thought to strategy, I sort of blundered through life with no real sense of what I was trying to achieve other than that I'd have choices. Need to explain a wee bit of background. Moved to NZ 1979. I'd qualified as a civil engineer in the UK and then drove buses to get enough money to come out here. A double-decker bus driver between ██████ and ██████, it was brilliant. I grew up in a relatively financially poor but emotionally incredibly rich home environment in one of the most privileged part of ██████, a ship building town. So we grew up in a huge house, we had no money but we parents who really passionately cared. I'm 1 of 7, the second oldest, I was the last one in the family to get a Master's degree. We have, I've lost count so I'm guessing, but something around 21 degrees between 7 of us, 1 sister who's got 9, she's just obsessive. My parents were pretty keen on supporting academic achievement and they were both professionals. My father was a minister and formally a foreign going master man, so he skippered ships during the war, saw enough so he wanted to change his life and became a minister. My mother did an MA in English and Scottish Gaelic and then became a primary school teacher. It was an environment that was pretty focused on achievement.	Pcpt
3:50.0 - 6:12.0	Came out here in 1979 and the quickest way to earn money was driving buses, you got paid huge money for that back then. But when I came out here, not long after my father got reasonably unwell and for years after we came out here ██████ nagged away that I couldn't afford to go over if he was really crook. So my vision of success was to have the ability to go to the UK with zero notice without compromising my family's welfare here. It sounds a pretty trivial thing but back in the early 80's it still cost \$2.5K and the national average wage was about \$7K it was a significant commitment and interest rates back then were 24%. It sounds kind of trivial now to say that was my benchmark for success but it did kind of drive me because I changed jobs a number of times. I went from being materials engineer for ██████ city council, which I loved doing but I became a drainage and earth moving specialist. In other words I was a digger driver and truck driver in ██████. Part owned a drainage and earth moving business but I learnt an enormous amount in 18 months and of all the things in life I was irrationally proud of, being a stunningly good drain layer and a very good digger driver, I'm still chuffed with. And I can still do it cause every so often I do gigs for people and lay there	Pcpt

Timespan	Content	Speaker
	drains. I'm no longer legally allowed to lay drains but I still do it.	
6:12.0 - 7:29.0	Then I went back to be city construction engineer in Gisborne. Then I transferred to be relations manager for what became ██████████. So I changed career twice significantly and that was probably the first time that I got exposed to any level of strategic thinking at a formal level. I became relations manager, so I went from an engineer in a very structured works dept to the person who ran industrial relations, public relations and human relations for an electricity company. That was one of life's defining moments for me because the guy I met, that I worked for for a number of years, ██████████ made a commitment to me when I joined that he would support my career development and no one else had ever even used words like career development. ██████████ was ex-main board of ██████████ so he was a guy with big international experience and still big ambition even then.	Pcpt
7:29.0 - 7:31.0	How did you meet him?	RJM
7:31.0 - 10:39.0	There was a tiny wee ad for this relations manager role and one of the things I've learnt in life (coffee arrives) I never chase work if I haven't met the people face to face so I went and had a meeting with ██████████ and I did some homework before I went to see him. People told me quite a lot of different things about him because he was an ex-██████████ boy who had gone off and hit the big time and then came back to semi-retire because his wife was crook. He would be in his mid-40s by then so he was quite a young retiree. I went and had a meeting with him and he wasn't what I thought he would be. He started to ask me what I would bring to the job and I went hang on, before we start that, everyone tells me you're a bastard, why should I work for you? He spent the next hour selling the job, he's a compulsive salesman and by the time he'd sold the job to me, he'd pretty well brought me in the process. Heaps of people applied and I got the job because Drew made up his mind then. So it was just one of these, again an aha moment, this really does makes a difference, doing your homework and getting a personal connection and I will say for the rest of my life I'd never bid for work where I hadn't had a chance to talk to the person who was doing the buying. Even in ██████████, we've walked away from big projects because they won't meet to talk about it. Govt procurement is an atrocious process. So ██████████ got quite quickly head hunted to run ██████████ marketing. ██████████ came and visited us at ██████████, ██████████ had been appointed chair at ██████████ as part of the whole corporatisation process and ██████████ dragged off down to the job of GM ██████████ marketing and within about 2 weeks I was dragged off down to be commercial manager for the Wellington region. ██████████ funded my MBA through ██████████, 24 years ago now, I still owe him.	Pcpt
10:39.0 - 10:42.0	This is early MBA days	RJM
10:42.0 - 11:32.0	MBA's were worth something then. I didn't do it for any real business reason. I had 2 drivers for this whole thing, 1 was I wanted to get some king of, I guess, validation for all the experience I'd gained. I was probably just turning 30 then so I thought I was an old man but I'd learnt heaps. But the other was I wanted to shut my Mother up. Being the last one...	Pcpt
11:32.0 - 11:40.0	So the MBA itself that wasn't something you look back on and go that's where I gained lots of knowledge and expertise...	RJM

Timespan	Content	Speaker
11:40.0 - 12:49.0	...No that's when I realised that I already knew an awful lot of these things cause. That was why I was intrigued by your question as to where did the genesis really start and it's such a gradual progression that I can't honestly say where things happened but all I know when I did the MBA and we started to look at formal strategic frameworks and the different models you can use to help strategic thought, which were pretty rudimentary, SWOT and PESTE analysis was pushing the boundaries back then, that I realised that I actually knew an awful lot of that stuff and a lot of the questions that I still ask today, what does winning look like? What success looks like? Were questions that I asked I guess relatively intuitively early on in life.	Pcpt
12:49.0 - 13:04.0	And before you moved, the shift between your engineering career and into management, the role you were describing. I guess you were using all those skills anyway.	RJM
13:04.0 - 15:13.0	There was one other little bit, while I was city construction engineer, back then unionism was compulsory and it was also quite radical and so I was a compulsory member of the [REDACTED] district local govt officers union and even for a bunch of local authority people the union pushed boundaries I was uncomfortable with. So I stood for the area president and I went to 2 meetings and there were only about 12 people there so I invited a lot of people to the meeting, the AGM and 64 people turned up and I got elected in a landslide. I was about 26 but I hate sitting on the side-line complaining and you either do something or shut up so I did something. That triggered a realisation that I was petrified of public speaking so I went to toast masters and again cause, quite an interfering sort of person, within probably 6 months I decided toast masters was too American so the [REDACTED] branch of toast masters left toast masters and formed the [REDACTED] club. [REDACTED] was a woman's public speaking club, we formed the first combined branch and it went enormously successfully for years and I learnt an awful lot, not only how to overcome my fears of speaking but quite enjoy doing it.	Pcpt
15:13.0 - 18:29.0	So there were a couple of things that happened probably in the run up to going to [REDACTED] or the [REDACTED] as it was and I got quite involved in the politics of industrial relations back then trying desperately to find some balance because the balance just wasn't there on either side and I felt, I guess 26 years old, so at the point a senior, incredible how you look back and think, what was I thinking. But I thought I was a senior member of the establishment and to some extent I was. I had notional control of the works dept, notional because the works superintendent was older and wiser and a great deal more forceful than me. It was one of those things, even then he had to come through me to get to the city engineer on any formal stuff. So I was involved quite a lot in the political end of trying to get balance as I said. We also had a complete disaster where there were various rumours of financial misdealings with some of the reasonably senior council staff. The works superintendent got so stressed about the fact he couldn't change some of these things that he committed suicide. I suddenly landed in the thick of all that as well cause I was president of the union for the district. I suppose a lot of learning to step back from things and take a detached view of what really had happened as much as I could. Back then there was no word processing so I hand wrote everything and I've got no copies of the letters I wrote to the council, to the chief engineer, to the national president of the union. It was pretty intense, I'd forgotten all about that as well. So I guess I had enough bits and pieces in my early career to give me, and quite a lot of responsibility thrust on me quite early, a combination of thrust on me and I went	Pcpt

Timespan	Content	Speaker
	chasing it.	
18:29.0 - 20:41.0	Did the MBA and again that was another genuine life changer for me because I met so many amazing people, many of whom are still friends today quarter of a century later. ██████ back in ██████ was a pretty dull place and to have a group of 26 really challenging aggressive fairly young people coming together once a fortnight, we were the first ever ██████ MBA ██████ ran. It was just the most brilliant hothouse of thinking. I learnt, I guess to validate what I'd already got, but I also learnt a lot more about myself, many lessons that I have to re-learn on a regular basis, some of which I'm still re-learning now. Finishing the MBA gave me an enormous sense of freedom and I quite quickly got head hunted by ██████ to head up their energy sector. So I was director of the energy sector for ██████ in 1992. Again I got exposed to a lot very, very clever people who were just extraordinarily strategic brains. ██████ was the MD.	Pcpt
20:41.0 - 21:15.0	I worked at FMG for quite a long time. (we briefly discuss ██████ who is known to both of us)	RJM
21:15.0 - 21:55.0	He was wildly erratic in his behaviour, he comes steaming across the floor hopping with rage and just spray at you and then 5 minutes later be best mates. But there was nothing malevolent about it but it always unsettled me...	Pcpt
21:55.0 - 22:44.0	I reported to a guy called ██████ but ██████ by passed that line all the time. So I spent a lot of time with ██████. (we continue our discussion regarding ██████)	Pcpt
22:44.0 - 24:57.0	He and ██████ and between the two of them I learnt an enormous amount about understanding what the question is that you're truly trying to solve and they were both incredibly good at that and as an engineer I always knew you measured twice, you cut it once but they took that to a whole new level from that. Neither of them would tolerate someone trying to solve a question that wasn't the real question. So dealing with symptoms got very short shrift from these guys, quite rightly too. But I still see people rushing off to solve symptoms, hang on what actually are we trying to do here? So they were very painstaking and methodical in truly testing what is the real problem. They were very very good at turning challenges into pictures and then very, very good at, I'm going to say unstructured but that was as an observer I couldn't see how they made the jump from the clear understanding of the problem to a range of solutions. I still see ██████ fairly regularly and he still makes leaps that I don't fully understand but he's nearly always bang on. There's a thought process that he can't verbalise but he gets it. I learnt an awful lot about taking a step back and making sure it was the right question being asked.	Pcpt
24:57.0 - 24:59.0	So this is on the job learning?	RJM
24:59.0 - 25:58.0	Absolutely, nothing structured about it what so ever. (they didn't have internal let's look at things...) If anything it was the other way around, they looked to me sometimes for some structure around them in terms of filling in the gaps between they knew the challenge was and where they were bloody sure the answer was. (██████ phone rings and we chat about ring tones...)	Pcpt
25:58.0 - 27:49.0	The other big influence back in the ██████ days was a guy called ██████ who was an independent director on the local board and he was another of these people who always asked why. He just pushed and prodded and challenged and he constantly came up with little snippets	Pcpt

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	that made me laugh but I remembered them. One of them was never confuse motion with progress, he regularly accused me of being as a busy as a dog trying to bury a bone on a marble floor, huge appearance of industry but no chance of success. Just a very steady influence. Bruce used to ask everyone a question when he met them - he'd say what are you reading at the moment? He said to me once in the lift, how do we make people read more? Hire people who read, ask them in the interview not after you've hired them...	
27:49.0 - 29:33.0	I then got seconded to ██████ in the UK as an associate partner. My father was crook at the time (...) ██████ who had transformed my life back in the early days at that point he was running a JV with ██████ and he said I'll find you a job in the UK and he did. Transferred to ██████ UK and set up the energy sector for them and that was I think one of the early cases where I could start with almost a blank sheet of paper and say what are we trying to achieve in the next 12-18 months, what's the long term win look like, what must we do in order to achieve that. We must have got something right because we went from pretty well a standing start to 12m pounds after 18 months which is quite a big (that's big today) that was 95-96.	Pcpt
29:33.0 - 29:41.0	When you did that process, that strategic planning process, was that when you grabbed books...	RJM
29:41.0 - 34:22.0	No, I'm kind of struggling to work out where all the bits came from but actually there is one bit that I have glossed over. Must have been when I was at ██████ city council back in the early 80's, ██████ and I, ██████ was born then. We were really struggling and I couldn't see how to get a real jump and I sent away some of the small amount of money we had and got a book that was about goal setting. ██████ was furious because it was a couple of bucks we didn't really have and that point we were scrabbling behind sofa cushions looking for loose change to buy milk. (...) We had built a brand new house, we literally were penniless. Got the book and it talked about the importance of having a really clear goal, so that's where visualising successful outcomes, that's where that comes from. You didn't write things like I want to have a nice car, I want a Mercedes SL 500 silver with... It had lots of things that weren't right in terms of goal setting when I look back on it but none the less it was the first time I ever said in 5 years we are going to be here. And that 5 years included having the section fully landscaped etc etc ... We achieved every single one of them in 18 months, we just blitzed the lot because we got really focused on what was going to make a difference. We did it the hard way, we did night shifts packing kiwi fruit... I'd prune every weekend, planted poplar poles for the catchment board, it was all stuff you could do at the weekend. So I worked a busy week and then worked the weekends (plus a baby). Every single cent we could chase we did. One of the lessons I was very slow to learn from that process was setting goals and going after them single mindedly is brilliant but you have to keep pushing the boundaries out and I blitzed my 5 year goals in 18 months and thought that was easy and then drifted for quite a long time. I was still busy but I was confusing motion with progress	Pcpt
34:22.0 - 34:30.0	I love that saying, I haven't come across that one in my travels and I instantly recognise clients where that is true.	RJM
34:30.0 - 34:50.0	That book was actually one of the pivotal pieces in the framework of learning to think much more strategically but based around a vision of what success truly is.	Pcpt
34:50.0 -	Fascinating, some of the stuff you've built on, you're thinking processes	RJM

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35:32.0	you've built over the years comes from a \$2 book rather than something like a Harvard business education and this is interview thirteen and most people have come from varied careers. No one has come through a traditional business type education...	
35:32.0 - 36:01.0	2 questions spring out of that. How much value do the structured strategic processes add in terms of the tuition but secondly I suspect if you go back and really dig, the success presents itself to prepared minds. So there's got to be that hunger for something	Pcpt
36:01.0 - 36:26.0	Everyone's learnt to think and bring in training. (...) You're right that inquiring mind	RJM
36:26.0 - 38:30.0	It would be interesting also to check, you go back through the original career choices of the participants, because I did engineering, it was quite an analytical place to start, so I did learn to think about foundations and about structures and about is the structure fit for purpose will it support the weight you're going to place on it? Doesn't matter whether you think about physical structures or philosophical structure you still have to do the same test, are the foundations adequate and is the structure going to support the weight. Even simple basic tests like that make a difference, there's nothing wise about that it's just common sense. Yeah that book was pivotal, I must see if I can find it, we have a house full of books, we never throw books away so we have 1000's (we briefly discuss electronic books and how they are great for travelling) I grew up, as a said my father was a minister, one room in the house was a study which was just lined with books, all incredibly boring books. But it was an environment where reading and I guess testing thought was part of the early DNA as well.	Pcpt
38:30.0 - 41:31.0	So rolling forwards from █████ and █████ in the UK, was supposed to come back to █████ and walked into the office and thought I could never come back here so I resigned and got recruited by █████ quite quickly and with no soliciting on my part. I came back to again I think focus on the utilities sector. My very first assignment was to go in and challenge the way the █████ was thinking about a new retail entity they wanted to set up. It was an interesting assignment because it went from, they wanted a world class programme manager and I said to the partner who was taking me down to talk to them, I don't even know what programme management is and he said yes you do, you've done it all your life you just didn't call it programme management which is again a really useful lesson, don't get carried away by titles, think about what it means. I got seconded into █████ as the world class programme manager for this start up retail company and within 6 months I had to resign from █████ because they wouldn't let me run the new business, they didn't want me running on secondment so I resigned, I only lasted a few months with █████ and ended up CE of █████ which was NZ's first █████ company. Again an enormously interesting planning process because they went from challenging a bunch of accepted ideas as a programme manager to melding it into something that really interesting business with a business model is only now starting to be replicated by others in the sector so we were 12/13 years ahead of our time. Which is just as bad as any other reason for getting something wrong, way ahead of your time you're still wrong.	Pcpt
41:31.0 - 42:08.0	It's only a very limited degree of self-satisfaction saying I was right in the idea but wrong in time, still wrong. (we discuss how master painters are famous after their death). Where's the satisfaction in that!	Pcpt
42:08.0 -	Going through that process for planning for █████, planning the way	Pcpt

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45:46.0	it was going to be positioned in the mind of the public, which was around choice, meant that when we sat down to say what are our contracts going to look like, we thought how can you reconcile a contract with everyone being free to choose so we were the only power company, probably ever, that said we will have no contracts, you choose every month when you pay the bill. So we got mass switching over to us, we simply couldn't cope. From memory Paul Holmes ran a piece on his Holmes report one evening and I think we had 40,000 phone calls in the next 1/2 hour and no call centre in the world will cope with that. We had 150 staff on standby in [REDACTED], just couldn't cope. Paul Holmes rang me the next night on his radio show the next night and said what's the deal, I've promoted you in good faith and I couldn't get through myself. Cause everyone listens to what you say Paul, 40,000 people rang as soon as you said ring can you please not do that again, he thought that was brilliant. He stayed resolutely pro [REDACTED] forever after. We got lots of other things wrong too. That's one of the enduring strategy lessons from me that having something that, you've got a philosophical foundation, a philosophical framework and you started to colour in some of the bits, but if it hasn't got a practical foundation as well you're stuffed. We thought we had because nobody had done it before but we made dumb assumptions like the other companies would cooperate with the process, why?? They just prolonged for so long some people forgot they requested to change. Our billing systems couldn't cope, our financial systems couldn't cope, our call centre most of the time couldn't cope. It was, some people got transferred across and didn't get a bill for 6 months and then got a big bill. ([REDACTED] continues recounting examples of the issues [REDACTED] experienced during this episode) An enormously interesting learning process not just for me but the NZ industry.	
45:46.0 - 45:59.0	Still today, the [REDACTED] is a very high profile area and you're in a very high profile position.	RJM
45:59.0 - 46:34.0	Well I burnt a lot of bridges in the [REDACTED] days so I went back to [REDACTED] as a partner in 2000. I said I'm not going anywhere near the [REDACTED] sector and I never have. Other than once a year where I take [REDACTED] and wife out for dinner...	Pcpt
46:34.0 - 47:12.0	A lot of your lessons are easy in hindsight, and underneath these questions I wonder about how we teach strategy using case studies. (yep) We can always see what the answer was, and there is a little bit of psychology that says when we look back it seems clearer in hindsight than it ever did at the time. The assumptions at the time were at least... Well it is easier to see where you could have got them wrong.	RJM
47:12.0 - 49:31.0	It is definitely much easier to see stuff with hindsight, but in fairness in the way that we'd thought, all of the [REDACTED] stuff was predicated by being owned by a benign parent who dominated the sector, the [REDACTED]. The week we launched [REDACTED] broke the [REDACTED] into 3 bits, (story continues...) I suppose one of the lessons for me was the lens through which you view something totally drives the way you think and behave. I've also learnt that there is no one lens, answers are situationally correct, there is no a right answer, ever because it depends entirely on your perspective. In almost everything in life there are winners and losers and if you're the winner you think everything you've done is right but that's only from one lens.	Pcpt
49:31.0 - 50:11.0	A decision like, a board could be blamed for ignoring obvious warning signs or pushing through adversity if we apply that retrospectively after we know who the winners and losers are. (yes, yes) You're right, no one	RJM

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	lens and I'm interested in how your lens developed. From what I'm hearing, the word eclectic sums it up, certainly not I went through a business school process.	
50:11.0 - 52:09.0	There is no question the MBA helped just because it gave me some structure around stuff which had been very, very eclectic or drawn from eclectic sources. But I suppose having thought it through in this discussion, that book around having a very clear view of what success looks like because that was one of the pivotal pieces. In the MBA we did a process management piece and we read a book called 'The Goal'. The notion that you often have to sub optimise parts in order to optimise the whole was another aha moment for me and it's so easy and it comes back to the lens used. I you the lens of just your silo, then often big organisational goals are things you fight against because it means you're going to lose something, whereas creating the right environment where it's okay to sub optimise you're part because it's good for everyone is something that, because a lot of the businesses I deal with were still rubbish at doing that, we still get siloed thinking, a completely monocular view of what winning looks like and there is a, just a lack of awareness or sophistication at the CE level because it is CE's job to get that big picture sold effectively. I just don't think we do it well.	Pcpt
52:09.0 - 1:00:11.0	Final little bits of the jigsaw, I think, reasonably early on in time at [REDACTED] I met a very unusual guy called [REDACTED]. [REDACTED] a [REDACTED] Jew who worked in Hollywood for years. He went through a complete life change which I think coincided with a wife change as well. He came up with a very simple metaphor for business, what he called his journey metaphor. Which started off as a view ([REDACTED] borrows paper and uses this during illustration - What's the quickest way from here to there, a straight line, but we go on a zigzag journey... You've got to know where there is... Lots of pain, failure, and go through that process again. Some keep going out there confusing motion with progress, some govt depts keep reinventing there...) [REDACTED] said good businesses, sports teams, performers in life generally operate on a much, much narrower band width. He drew that kind of thing, each course correction is minor and you go looking for the signs as a feedback mechanism rather than a failure mechanism (story continues regarding the product that [REDACTED]'s licensed this all over the world) [REDACTED] taught me an awful lot about putting a very structured way of thinking around that goal setting work, the goal achievement piece. Goal setting piece is easy, you can quite easy what winning truly looks like, getting there is often the hard part. [REDACTED]'s model firstly requires you to be really specific about where here is and sufficiently specific about there to know what you're aiming for all the time and then to build 3 month plans that require a change in behaviour the next day and he splits everything into people, process, tools... I learnt more from [REDACTED] around implementation of strategy and taking grandiose strategies and turning them into doable things, than I learnt from anyone else.	Pcpt
1:00:11.0 - 1:00:22.0	How much a strategist can be divorced from the actual implementation? Can you form a strategy, the consulting model really...	RJM
1:00:22.0 - 1:01:44.0	But I'd really struggled with it, so said a number of times, I'm quite an interfering person so I hate sitting on the side lines so in terms of primary sectors strategies I lead the [REDACTED] marketing strategy, the NZ [REDACTED] strategy and the NZ [REDACTED] strategy. In all these I'm still an interfering person, so I'm now chair of [REDACTED] NZ so I can actually find out why no one's implemented the strategy properly. I've arbitrarily set a strategy consistent with the strategy that we'll double the value of the	Pcpt

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	sector in 5 years and everyone is running around in a tizz saying how are we going to do that? It all requires significant behavioural change but once I socialised that I'm going to be quite hands on because I don't like sitting back and watching and I don't, there may be a role for a strategist who doesn't care about implementation but I don't think that's professionally and socially responsible.	
1:01:44.0 - 1:02:09.0	Certainly the theme, certainly what I'm hearing as well that no. because we teach a divorced view of strategy (yes but it's wrong) Some in the military said to me, you really need to be lying down in the field to understand where you want to put your soldiers...	RJM
1:02:09.0 - 1:05:21.0	I do very strongly believe there are groups of people in the world, including groups of consultants, who set out to build academically perfect strategies. That's brilliant if you want to do a PhD, go for it but don't sell it to someone as something that will improve their business. I just see an enormous amount of wasted resource and lost opportunity through grandiose strategies that have got no chance of success. Whereas with ██████ sector strategy not only do I believe it utterly can be done but I still in my own time go and speak to groups all around the country about what they have to do, it's no one else's responsibility... A catalyst for change is required and I think that's a strategist's responsibility as well. Now that's a lousy business model I couldn't afford to do what I do if I was at ██████ but I can afford to do it now. I'd much rather have something that the purists sneer at but that will achieve a tangible, beneficial outcome for my clients than do something where everyone says that's an awesome strategy and nothing changes. The ██████ thing for me, I could see the power of having something focused on an operational rather than a strategic planning point of view but it meant that every strategy I do I test for operational potential. The last two big ones both had very detailed implementation plans that weren't public we found that in the 1 st day of releasing the ██████ strategy the first request came from one of the competing companies and the second request came from the Australian equivalent. It been \$2 million dollars and they've got a strategy written by a guy with a PhD, and I'm not bagging PhDs. I started one on the derivation of prediction of the successful use of sponsorship as a marketing tool...	Pcpt
1:05:21.0 - 1:05:54.0	I want a practical outcome, how can we do this better. How can people out there get to the 'there' (I point to the illustration) rather than, cause what I've seen in my travels, and I do deal with smaller clients, but no concept of how to do it well. So a CEO is told they are the chief strategist and then they think they are. In my teaching I often tell my students that one of the most important things to know is what you aren't good at.	RJM
1:05:54.0 - 1:11:26.0	That's one that's worth teasing out because if you look at the businesses that have done incredibly well recently, for example Icebreaker, one of the first things Jeremy did was sat down and said where are my big gaping holes and he hand-picked people for his board and neatly filled every one of his gaps and they've never had to pay for professional services fees (story continues...) Eleven years ago there was a guy who worked in corporate finance in ██████ for ██████ I took him to a meeting where this was this off the wall client came to present why he was looking for more funding and why he was god's gift to everything. And this guy asked lots of good questions and when I left I asked what do you think and he said – well I've got a formula for valuing a business, $A + B = C$. A is the value of the IP in the inventors head, B is the amount of commercial acumen available in the business. I've always found that the	Pcpt

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	higher the value of A the more minus value of B and hence you get a minus value of C. Most inventors think they know everything, if you haven't got the self-awareness to realise the gaps you've got you're not worth continuing with... (Asks about the size of the business - \$7m, one of Pcpt's companies ██████ story, proper board, one of the world's best people, accountant who is an investor, works sensationally well) (we discuss that there are good people out there...)	
1:11:26.0 - 1:13:00.0	If your studies are saying that strategy practitioners with a reasonable track record have not acquired the tools and disciplines from formal study, then A you have to question the value of a lot of the formal study but I'd almost go one step further and it would be interesting to test people who rely on their formal study to do their strategic thinking to see if there is a difference in the implementability of the outcomes. I can think of one person who did an MBA through a prestigious school and who thinks he is now god's answer to business. I still think he's an opinionated git. You better not put that into the report. (I assure him nothing will be identifiable) But I'd love to see if there is a difference in the way that people implement and execute (that's a good question)	Pcpt
1:13:00.0 - 1:14:12.0	One of the problems at the start was how do you identify someone who is good at strategic thinking? Most research seems to just use job title so they pick CEOs or CSOs. I use this analogy, if I wanted to research how to become a really good golfer then I have to pick the people on golfing ability if I use any other method (yes absolutely) like the car they drive I'll be all over the place. So I've used reputation and the stories have been mainly of people picking up their skills from a wide variety of places. The MBA doesn't sound like it has . . .	
1:14:12.0 - 1:18:32.0	The MBA gave me some of it, it gave me validation and that was one of the key things, that what I had learnt actually did all fit into a framework. It probably gave me a little bit more structure than I'd had before but it also, by exposing me to a whole bunch of quite brilliant people. Some of the Massey lecturers were completely brilliant (that's rare, most people at university said staff didn't stand out) We had a few, ██████ who did the marketing piece and she was also on some listed company boards. She was completely outrageous but I learnt a lot from her. ██████, maybe HR. I did my research report on large scale organisational transformation in some Human Resource related cost issue. That was really looking at the SOE model and how well it had worked in forming a view how we measure success at a public level. To dig a little bit beneath the public sector. If you look at ██████ as an example, they went from, I think, 4999 people in 1987 to something like 2000 within two years, a massive reduction. When I interviewed people who had left, it was the most liberating thing that had happened to them. There were very few failures in that process in terms of people leaving feeling utterly cheated at least the ones I interviewed. But what they never publicly accounted for was the loss of tacit skills. There are a whole pile of sills that people are aware of but the ones you take for granted are the ones that you aren't aware of. Part of our challenge was saying it's the balance. Our hypothesis was that it wasn't right and had to concede I was wrong. Tacit skills, while they were never explicitly acknowledged in the process, the net result was a liberated organisation as well. So a lot of tacit skills, you sometimes can't throw the baby out with the bath water but sometimes the baby needs to be thrown out, sometimes all you need is the bath. (██████ discusses who he did the project with) I did learn useful stuff from the MBA, I suppose it gave a framework to hang a lot of the things I learnt before and I could then identify the gaps so I could hangs different	Pcpt

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	things on.	
1:18:32.0 - 1:18:38.0	Out of curiosity when Deloitte looks for people coming in, picking up people from university...	RJM
1:18:38.0 - 1:22:32.0	We take on average 120 grads each year, nationally. We have [REDACTED] staff around the world so It's big (I didn't realise it was quite that big) We have almost [REDACTED] staff in NZ, it's a sizable business and I used to host our grad recruitment, I was the safe elderly face of [REDACTED]. (Did you try and pick out the best and the brightest?) We didn't have to a lot of trying. The stats are roughly, I think 35,000 people graduate every year in NZ, a much, much smaller number graduate in disciplines that appeal to us and of those on average 2,500-3,000 apply for a job with [REDACTED] and we would choose 100-120 each year. And we provide them with the most expensive training, you wouldn't believe the training these people get. They get supported with study leave, all of them finish as a chartered accountant. A lot of them also get admitted to the bar in the process so we have a lot of double law and commerce grads. ([REDACTED] continues to explain the training methods at [REDACTED])	Pcpt
1:22:32.0 - 1:26:44.0	(How would you get strategy people into [REDACTED]?) We've got two levels of strategy, so I ran the economic development strategy group which is in our mid-market vectors so it was kind of an anomaly because I was madly passionate about economic development strategy, partly because 7 years ago the then CEO gave me the challenge of owning the trade and enterprise account (not public stuff). I went after that account rabidly, so much so I visited their office so often that the receptionist thought I worked there. I got a phone call from the CEO of the new entity and he rang me and said – right put your money where your mouth is, I need a General Manager strategy for the next 6 months and I can't afford to pay your fees so I did it at effectively half my normal fee and learnt an enormous amount about national economic development strategy from the point of view of the people who had to implement it and it was just brilliant. If you want a crash course in what's truly important in terms of strategy and the implementation of it, getting a job like that was just a god send because I learnt an enormous amount. So for the next 7 years I owned that account and that grew into doing all the primary sector stuff because it was largely funded by trade and enterprise in the early days. That's my side of the business. [REDACTED] consulting have a strategy and op's group who do much more business strategy, much more methodology driven and I've got no exposure to how successful it is (he said in seemingly guarded tones). They are people almost at the autistic end of the spectrum, they are scary bright and they push them through training all around the world so they can slot into a team anywhere in the world. And they give them very, very, very good methodology but their biggest driver is the IT systems that will be required to support the change. Consulting is very much about IT, they've got some fabulous practitioners which I think are up there with the stunningly good business thinking people. But I just didn't have enough exposure to know exactly what they were doing. [REDACTED] is a big business and I had enough to keep me focused and I just worried about what I could influence and control and I've got no idea what's going to happen with that group now	Pcpt
1:26:44.0 - 1:28:36.0	I still have access to all the support, they resource and still have a car park. They have been fabulous but nothing I do down there is [REDACTED]. I chair 4 entities and sit on two other boards so, and most of them are [REDACTED], I've only got one board here at the moment. I'm just about to do a really interesting strategic review in the primary sector which I will do pretty much entirely do by myself. If I need additional resource I will	Pcpt

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	scream for [REDACTED]. To all intents and purposes self-employed but carrying a retired [REDACTED] partner card, along with four other cards. (We discuss how you get on boards)	
1:28:36.0 - 1:28:44.0	If you were looking for a strategist, in inverted commas, what are some of the outstanding characteristics that you would look for in a person?	RJM
1:28:44.0 - 1:30:22.0	The things I look for people who are good at music or maths, so people who can look at random data points and turn it into a picture and mathematicians and musicians are good at that, they look for harmony, for ways that you can fold things into digestible bits. People who ask why and people who read. So off the top of my head those would be my requirements. I'd overlay on that, I never hire people I don't like. At the end of the day I've spent more time with my colleagues than I have with my wife so there has to be a chemistry fit there. Then once people get through that process I make them spend an hour or 2 with the rest of the team and the team decided.	Pcpt
1:30:22.0 - 1:30:44.0	It's really fascinating because I've asked that question in and it's sometimes what people say and what they don't say. You're not saying they need an MBA, would need anything like that and that's the general rule. It's more the aesthetics, it's a little hard to put your finger on.	RJM
1:30:44.0 - 1:44:57.4	I hired one guy into [REDACTED] a long time ago and it was probably the biggest struggle I had to get anyone into Deloitte up to that point. Because his CV, he was a fitter and turner from [REDACTED] who had risen through the union ranks, he was a young guy. And then he got hepC through a bad blood transfusion and had four kids and I went to lecture a [REDACTED] MBA group on e-business strategy. When I came back as a partner I was to head up e-business, the things we do. And this guy was incredibly on the ball and just asked really intelligent questions, hugely engaging. As soon as I was back in [REDACTED] he'd sent me an email saying I want to work for you. It took six months to get him in because he was a fitter and turner and I was saying I don't care because he's got a brilliant brain. He wrote research report on governance and [REDACTED] [REDACTED] still uses him as a teaching aide. [REDACTED] is one of these people, do you know [REDACTED] (yep) [REDACTED] is one of these people who does not suffer fools lightly (no he doesn't) You fit in or you fuck off. The FIFO model is great. (we discuss the FIFO model with laughter) We hired [REDACTED] and he lasted three years before he decided he couldn't do what he truly wanted to do which was make a personal impact on Maori economic well-being. But he'd been promoted twice in that 3 years, completely exceptional and left to set up a consultancy. Normally you get marched out of the door without even the green bag if you do that, we gave him his office furniture, let him connected to the network and keep your access card until you don't need it anymore. Never happens in my experience. He is still one of my best mates and is running a very successful [REDACTED] practice. (we discuss [REDACTED]) (Often the people that come through the university at the top are not the people here. The people that do really well probably know how to play the university game. We discuss doing well in a university environment) It is tough, we do tend to set the bar high academically but it's by no mean the defining characteristic with which we hire, the chemistry fit is extremely important. (when you're getting that number you have to have some method, you can't interview 1,000 people) We whittle it down pretty quickly ([REDACTED] discusses [REDACTED] recruitment process). (we discuss getting degrees and [REDACTED] family and then the interview is wrapped up)	Pcpt