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Transitioning into openness : strategizing for sustainability with open strategy practices

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Transitioning into Openness: Strategizing for Sustainability with Open Strategy Practices

A doctoral thesis submitted in partial fulfilment of the requirements of the degree of Doctor of Management Sciences

Submitted and defended on November 17th, 2023

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Transitionner vers plus d'ouverture : Elaboration de stratégies durables grâce aux pratiques de stratégie ouverte

Une thèse de doctorat soumise en vue de satisfaire partiellement aux exigences du diplôme de docteur en sciences de gestion

Présenté et défendu publiquement le 17 novembre 2023

Par David Montens-Lataire

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Abstract

In the realm of strategic management, the concept of open strategy has garnered much attention over the last decade. While foundational elements of transparency and inclusion have been established, the management of complexity, fostering participant inclusion, and building commitment in strategy implementation remain crucial challenges. This thesis investigates the potential of open strategy to address these challenges, particularly in the context of corporate social responsibility (CSR). Drawing from a longitudinal case study in a French multinational in the home improvement industry, this thesis navigates the challenges and potential of open strategy in embedding CSR within an organization's strategic framework. The case outlines a strategic turn toward CSR, with substantial stakeholder consultation and collaboration. A strategy-as-practice (SAP) approach is employed to focus on the people who participated and on the materiality of the process. This thesis explores how open strategy practices support the formulation and implementation of CSR-oriented strategies within complex organizational contexts via three standalone articles. First, stakeholder engagement complexities as part of open strategy are explored, considering organizational, strategic, and technical dimensions. Second, the thesis investigates how organizations can foster the inclusion of participants by examining the sense of belonging and authenticity experienced by individuals engaged in open strategy processes. Finally, the research assesses the role of material artifacts in influencing employee commitment during strategy implementation. The findings contribute to a deeper understanding of the dynamics of open strategy, stakeholder engagement, and materiality, thereby emphasizing the importance of diverse perspectives and collaborative approaches in shaping sustainable and inclusive strategies.

Keywords: Open strategy, strategy as practice, CSR, case study, complexity, inclusion, commitment

Résumé

Dans le domaine du management stratégique, le concept de stratégie ouverte a pris de l'ampleur. Alors que les éléments fondamentaux de la transparence et de l'inclusion ont été établis, la gestion de la complexité, la favorisation de l'inclusion des participants et le renforcement de l'engagement dans la mise en œuvre de la stratégie restent des défis cruciaux. Cette thèse étudie le potentiel de la stratégie ouverte à relever ces défis. S'appuyant sur une étude de cas longitudinale au sein d'une multinationale française, cette thèse explore les défis et le potentiel de la stratégie ouverte à intégrer la responsabilité sociale des entreprises (RSE) dans le cadre stratégique d'une organisation. Le cas décrit un virage stratégique vers la RSE, avec une consultation et une collaboration significative des parties prenantes. Une approche de la stratégie en tant que pratique est utilisée pour se concentrer sur les personnes qui ont participé et sur la matérialité du processus. Cette thèse explore, par le biais de trois articles indépendants, la manière dont les pratiques de stratégie ouverte soutiennent la formulation et la mise en œuvre de stratégies. Tout d'abord, les complexités de l'engagement des parties prenantes dans le cadre de la stratégie ouverte sont explorées en tenant compte des dimensions organisationnelles, stratégiques et techniques. Ensuite, la thèse étudie comment les organisations peuvent favoriser l'inclusion des participants en examinant le sentiment d'appartenance et d'authenticité éprouvé dans des processus stratégie ouverte. Enfin, la recherche évalue le rôle des artefacts dans l'engagement des employés au cours de la mise en œuvre de la stratégie. Les résultats contribuent à une meilleure compréhension de la dynamique de la stratégie ouverte, de l'engagement des parties prenantes et de la matérialité, en soulignant l'importance de la diversité des perspectives et des approches collaboratives dans l'élaboration de stratégies durables et inclusives.

Mots-clés: Stratégie ouverte, stratégie en tant que pratique, RSE, étude de cas, complexité, inclusion, engagement

Encouragement is oxygen to the soul. Good work can never be expected from a worker without encouragement. No one ever climbed spiritual heights without it. No one ever lived without it.”

- George Matthew Adams -

“Sometimes your joy is the source of your smile, but sometimes your smile can be the source of your joy.”

- Thich Nhat Hanh -

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For the sweetest and most wonderful,

For you, my son,

Hector

Author's declaration

I have independently completed this thesis and the research that it refers to. All quotes, images, and ideas created by other people have been identified as such within the text. This work has not been submitted in whole or in part for any prior degree. The early findings of this research have been presented at several conferences cited below:

J'ai réalisé cette thèse et la recherche à laquelle elle se réfère de manière indépendante. Toutes les citations, images et idées créées par d'autres personnes ont été identifiées comme telles dans le texte. Ce travail n'a pas été soumis, en tout ou en partie, à un quelconque diplôme antérieur. Les premiers résultats de cette recherche ont été présentés à plusieurs conférences citées ci-dessous :

- Montens, D. (2020). *Opening strategy or opening Pandora's Box?* XXIXème Conférence Internationale de Management Stratégique, Toulouse (Online).
- Montens, D. (2021, July 8). *Collaborative governance and transparency in open strategy processes: Balancing belongingness and uniqueness through inclusive and participatory practices.* 37th EGOS Colloquium, Amsterdam (Online).
- Montens, D. (2022, June 31). *Revisiting inclusion in open strategy through the sense of belonging and authenticity.* XXXIe Conférence Internationale de Management Stratégique, Annecy, France.

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Chapter 1. General Introduction

The special issue of *Organization Studies* on open organizing (Splitter et al., 2023) begins by stipulating that our culture is becoming more open due to the rising popularity of societal values like democratization, liberalization, accountability, and equal opportunities; the rise of social software that facilitates connectivity, self-organization, and community development; and the growth of wicked problems, which are problems that are complex and difficult to solve. Over the last decade, strategic management—including the study of open strategy—has gained prominence. The work of Chesbrough and Appleyard (2007), who named and defined this phenomenon, is one of several foundational elements of open strategy. According to their definition, an organization’s open strategy fosters open innovation. Whittington et al. (2011) define openness in open strategy through the characteristics of transparency (relative to the communication of strategy) and inclusion (relative to the people involved), with an emphasis on internal practitioners, as opposed to Chesbrough and Appleyard’s (2007) definition, which is focused on external practitioners (who are central to the core of open innovation).

Inclusion and transparency, the two main constructs of open strategy (Hautz et al., 2017; Whittington et al., 2011), have been discussed before in the strategic management literature; however, the shift toward greater openness in contemporary society, culture, and organizations is a new phenomenon (Seidl et al., 2019b). Open strategy is more progressive than conventional strategy because it endeavors to include more stakeholders in the decision-making process, both within and outside the organization (Chesbrough & Appleyard, 2007; Whittington et al., 2011). This newly discovered transparency necessitates a more collaborative approach to strategy, in which various organizations can contribute to the development of tactics. An open strategy

enables novel forms of strategizing by bringing together the fundamental perspectives and values of numerous participants.

“The participation in an organization’s ‘strategic conversation’, the exchanges of information, views, and proposals intended to shape the continued evolution of an organization’s strategy” (Whittington et al., 2011, p. 536) is the primary definition of inclusion in open strategy. The objective is to involve more individuals from outside the organization in the “strategic conversation” by consulting them and listening to their input. In addition to implying greater openness, this phrase refers to the “visibility of information about an organization's strategy, potentially during the formulation process, but especially with respect to the final strategy” (Whittington et al., 2011). Specifically, the concept of open strategy implies that formerly excluded parties can now contribute to strategic topics and decisions. It also endeavors to transfer the emphasis from secrecy to open communication and consensus in strategic decision-making. Inviting other perspectives to participate in the formulation of objectives and the discovery of mutually advantageous means of attaining such objectives also lends substantial support to democratization and participation efforts at different levels within companies. Therefore, managers must consider the reactions of subordinates, employees, and external stakeholders prior to making any significant decisions as part of an open strategy.

Transparency is the foundation of openness in organizations; thus, it makes sense to emphasize it even though openness can assume various forms in different areas through varying degrees of transparency, inclusiveness, or decision rights. According to the authors, “with openness typically referring to greater transparency for information and contingently to wider inclusion in processes and greater access to decision rights,” transparency is required for either inclusion or decision-making rights (Splitter et al., 2023, p.13). Transparency is believed to

improve strategic decision-making by compelling leaders to consider a broader spectrum of opinions regarding the mission of the organization (Seidl et al. 2019a).

It has been demonstrated that involving more people in the strategy-making process can be advantageous, but there are also concerns regarding whether these new people have the necessary knowledge and skills to effectively contribute to the process (the “dilemma of process,” “commitment,” “disclosure,” “empowerment,” and “escalation”) (Hautz et al., 2017). Increased transparency (Appleyard & Chesbrough, 2017; Mack & Szulanski, 2017), stakeholder pressure, the complexity of an open strategy (Malhotra et al., 2017), and stakeholder commitment (Seidl & Werle, 2018; Stieger et al., 2012) are all obstacles identified along these lines (Seidl et al., 2019b). According to Seidl et al. (2019a), to effectively confront conservatism, “the research agenda begins with who to mobilize and how to empower” (p. 17).

Being open helps with a variety of things, including communication, creativity, innovation, cooperation, and learning. Open organizations are systems of shared leadership that utilize distributed authority among members who are responsible for their own self-organization. No one individual or group possesses all the solutions; rather, everyone provides their own distinct perspective on the tasks that need to be completed. People from different backgrounds (for example, technical versus non-technical), who might otherwise be excluded from decision-making processes within an organization due to differences in background knowledge or experience level, are able to play an equal role in contributing to the success of the organization owing to this approach. Additionally, open companies are more effective in harnessing diversity because they do not rely on any one person or group that has all the answers and instead draw from the distinctive capabilities and perspectives of everyone who is involved in the decision-

making processes. This approach contributes to ensuring that solutions are more inclusive of all stakeholders and appropriate for their needs.

In addition to the emergence of open strategy and the shift toward greater openness in contemporary society, culture, and organizations (Seidl et al., 2019b), grand societal challenges (“massive social and environmental issues that transcend national borders—such as climate change, inequality, disruptive migration, and global pandemics—and that have potential or actual negative effects on large numbers of people, communities, and the planet as a whole”; (Voegtlin et al., 2022, p.2)) have also emerged and been identified. For enterprises to effectively face the grand societal challenges (GSCs) of the modern era, they must rethink their organizational structures as well as the day-to-day actions they take within their ecosystem and the world. Organizations are required to adapt to new settings, new expectations, new procedures, and new realities as a result of the numerous changes that occur every day (Varum & Melo, 2010). When facing GSC, organizations and their leaders are faced with increased complexity in steering their strategy and are required to respond to this complexity in a manner that is “consistently inconsistent” (Schad & Smith, 2019). In fact, the GSCs frequently require companies to simultaneously pursue competing demands, which, by their very nature, necessitate the coordinated and sustained effort of various and diverse stakeholders working toward a problem or goal that has been explicitly specified (George et al., 2016, p.1881). Thus, the aspiring characteristics of open strategy (inclusion and transparency) come as a potential means to support organizations in addressing GSCs.

GSCs frequently refer to the sustainable development goals (SDGs) of the United Nations (UN), which can appear to be aspirational and occasionally distant from our realities. On the other hand, many of these global challenges—such as poverty and climate change—may be

addressed on a local scale and are evident in our own countries and backyards (George et al., 2016). The discussion that continues in the literature indicates that certain problems, such as GSCs, are too complex to be solved by a single organization. Schad and Smith (2019) identify three factors as the driving factors of complexity in GSCs. These factors are plurality (multiple stakeholders with different agendas, resources, and perspectives), change (capturing the uniqueness of each GSC and providing disruptions), and scarcity (dealing with uncertainty). Furthermore, depending on who and what is associated with them, GSCs are caught up in processes of continual reconfiguration (Ferarro et al., 2015). Academics have also been investigating the manner in which business models have a negative impact on a variety of stakeholders, even when the transformation of a certain business model was intended to have good environmental and societal consequences (in addition to economic effects) (Marti, 2018). They emphasize the importance of creating various types of spaces and platforms that enable a better understanding of the issues and conflicting perspectives of various stakeholders (Marti, 2018).

The issue of sustainability is one that affects people across the world and calls for concerted action. Because it is such a difficult subject, governments, markets, and organizations are either unwilling or unable to respond to the challenges that stem from the problem of climate change, as the problem is rather complex. In 2015, 193 countries came to an agreement on the 17 SDGs proposed by the UN. These goals were established in recognition of the challenges that our modern society is experiencing. However, these SDGs represent a number of interconnected problems, and the societal transformation in question needs to be tackled in a holistic and, thus, communal manner and at a number of different levels.

In order for our society to be able to create a future that is sustainable, it will need to confront multiple complexities and learn to deal with the following aspects: (1) unavoidable uncertainty, which is caused by undetermined causalities in multiple coupled non-linear systems; (2) normative ambiguity, which is caused by co-existing value systems and, thus, differences in interpreting information; and (3) unintended or unanticipated consequences, which are caused by the impacts of unrelated events and temporal and spatial dispersion (Renn et al., 2011). In a world that is becoming increasingly volatile, uncertain, complex, and ambiguous (VUCA), dealing with complexity will require a diverse set of skills, perspectives, and approaches as well as a wide variety of knowledge sources. Therefore, the perspective of openness through transparency and inclusiveness, which is proposed by the concept of open strategy, might be a means to handle the complexity that is presented by the subject of sustainability. One of the most promising strategies for effectively meeting the SDGs is to utilize the expertise and originality of the public. Topics of sustainability are becoming increasingly central and more strategic with the increase in external pressures, such as pressure of society, young generations, or planetary limits being overreached. In order to dive into how certain organizations make sustainability strategic, there is a need to understand how things are made strategic or how things become strategic. We could all agree that the survival of the world is strategic; however, what is good, what is a success today, might not be so tomorrow, and it is necessary to understand how organizations transition into sustainable business models and how they strategize for sustainability.

Over the years, the concept of corporate social responsibility (CSR) has been referred to under a variety of different labels, some of which are now used interchangeably (Fatima & Elbanna, 2023). Despite this, the term CSR has been most widely utilized by scholars (Matten & Crane, 2005). The notion of “sustainability,” also known as “corporate sustainability,” is an

umbrella term that encompasses the notion of CSR. Consequently, CSR serves as an intermediary tool for evaluating corporations' attempts to achieve a balance among the three bottom lines (economic, social, environmental) (Elkington, 1977); thus, this thesis utilizes the term CSR in further discussion based on the following definition provided by the United Nations Industrial Development Organization (UNIDO) to engage with greater clarity and serve as a guide for the remainder of this thesis: "Corporate social responsibility is a management concept whereby companies integrate social and environmental concerns in their business operations and interactions with their stakeholders. Corporate social responsibility is generally understood as being the way through which a company achieves a balance of economic, environmental, and social imperatives ('triple bottom line approach'), while at the same time addressing the expectations of shareholders and stakeholders" (United Nation's Industrial Development Organization, 2023).

Because of the recent emphasis on "mainstreaming" CSR, a significant proportion of the debate on CSR debate has shifted "from being about whether to conduct corporate social responsibility to being about how" in the last decade (Smith, 2003). When it comes to research and theory on CSR, Aguinis and Glavas (2013) demonstrated through their investigation that a significant amount of work has already been completed. A significant number of these scholarly publications discuss the reasons why firms participate in CSR, the outcomes that occur as a result of their participation, and the context in which these corporations acknowledge CSR. CSR proponents argue that CSR is a competitive advantage for businesses because it is not considered an expense but rather a strategic initiative that businesses readily adopt to set themselves apart from the competition (Beji et al., 2021; Porter & Kramer, 2006; Serra-Cantalops et al., 2018). However, for most organizations today, CSR is a strategic problem (Story & Neves, 2015;

Zerbini, 2017), with the primary focus being on an organization's desire to reap some sort of benefit in exchange for making efforts to better serve its direct and indirect stakeholder groups. Scholars need to address organizations' strategic interest in CSR because of the substantial effort and resources spent on adopting CSR strategically within an organization (Bansal et al., 2015). Moreover, not sufficient attention has been devoted to the processes that lead to participation in CSR and the elements that influence the outcome of a certain situation (Aguinis & Glavas, 2013).

Thus, open strategy could be understood as an overarching process that creates the places and platforms to meet the sustainable development goals through CSR actions and to manage the complexity that is inherent in the expectations and characteristics of the latter. In fact, the objective of open strategy is to broaden the scope of participants in strategic planning beyond the top management level and to open the process to a variety of people both within (Whittington et al., 2011) and outside the organization (Chesbrough & Appleyard, 2007). Through three separate articles, this thesis aims at bridging the several gaps explained below and answer the overarching question of "How can open strategy practices support the formulation and implementation of an organization's socially responsible corporate strategy?"

Key elements such as legal aspects, corporate culture, and multistakeholder participation models are critical to maximize the benefits arising from such initiatives of an organization. Open strategy has potential value in addressing complex challenges faced by companies or organizations across different avenues, such as CSR. However, it is important to bear in mind that open strategy should integrate knowledge from different actors with the complementarity of individual experience (Mura et al., 2016). In doing so, both the microcosm of internal procedures and external relationships must be considered since individual stakeholders have multiple

interests beyond their personal careers. It is through this dialogue between publics that meaningful insight can be generated, ultimately resulting in strategies that are beneficial for all parties involved.

To begin, this thesis examines, via a qualitative meta-synthesis, how organizational complexity can be managed through the use of facilitation and stakeholder participation (Chapter 4). Thereafter, through two more articles (Chapters 5 and 6) that discuss the longitudinal case study I conducted within a multinational corporation operating in the market for do-it-yourself and home improvement products, this thesis takes a deeper dive into participant inclusion and commitment.

The research philosophy employed in this thesis emphasizes the subjective nature of knowledge generation within organizations. Interpretive constructivism acknowledges the value of individual interpretations and their role in shaping the perception of organizational reality, emphasizing the use of qualitative and inductive research methods. The thesis proposes the utilization of longitudinal case studies as a valuable research methodology. This approach involves conducting comprehensive analyses of an organization over a period of time, enabling researchers to discern alterations, patterns, and advancements. Longitudinal case studies offer comprehensive insights into the processes within organizations, enabling the investigation of the mechanisms behind changes and providing practical insights for decision-making purposes. In brief, the thesis rationalizes its selection of methodology and epistemological position by aligning them with the notion of socially and individually constructed knowledge within organizations. Additionally, it opts for longitudinal case studies to offer comprehensive understandings of organizational dynamics over an extended period.

The purpose of this case study (presented more extensively in Chapter 3) is to specifically focus on a strategic project that was recently deployed by HomeCo. The case study takes place at HomeCo, a global corporation involved in the do-it-yourself (DIY) and home improvement industries. HomeCo employs a platform-based methodology that promotes collaboration and employee input. The objective of the project is to co-construct a new strategic turn by developing and embedding CSR into the company's corporate strategy and to disseminate it throughout the company's business units (BUs). As part of the process, a phase of consultation with stakeholders, a phase of collaborative strategy formulation, and a series of sensemaking workshops were held across the entire business.

The Gilets Jaunes crisis, Greta Thunberg's ascent to prominence, and climate protests contributed to 2018 being a watershed year for environmental activism. HomeCo issued a call to action after their international convention in Paris was believed to have failed to address environmental concerns. In March 2019, a two-day meeting was held to initiate the strategic planning process with a restricted group of individuals. The new strategy is based on the analysis of over 4,500 verbatim quotes from global stakeholders.

Ten individuals spent close to a year attempting to establish a balance among the economic, human, and environmental priorities of the strategy. The primary emphasis of the strategy was alignment with the UN SDGs. The initial proposal was rejected in July of 2019 and has undergone extensive revision and refinement since then, with broader inputs from various stakeholders.

The new strategic plan was developed in March 2020 and included 24 commitments based on input from key stakeholders. When COVID-19 altered initial delivery plans, the CEO opted to include general directors and shop managers. "Master connectors" were designated to

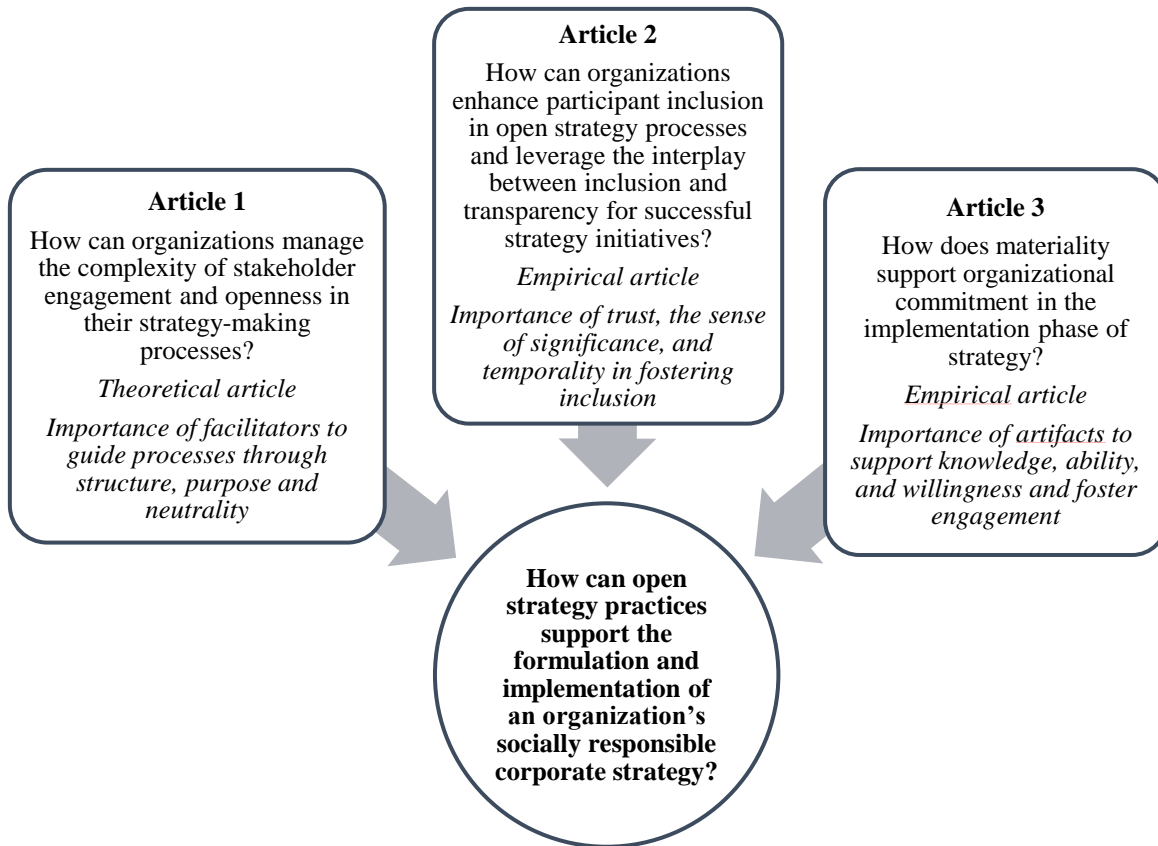
supervise the deployment of an appropriation workshop. They utilized a documentary to explain the new plan, emphasizing the importance of starting from the bottom up to ensure that everyone was on the same page. To ensure that all 130,000 employees understood and adopted the new plan, over 8,800 sessions were conducted. Each employee was encouraged to devise their own means of implementing the concept. The organization intended to make a lasting impact and intends to employ key performance indicators (KPIs) to measure its progress.

This strategy empowered employees, fostered a culture of accountability, and incorporated CSR into HomeCo's overarching objective. The organization is still hard at work on the local adaptation and implementation of the strategy.

From this general introduction and overarching research question are developed three independent articles and their research questions ([Table 1](#)). These articles are briefly presented in the following sections.

Table 1

Summary of the Thesis' Research Questions and Contributions



Complexity, Stakeholder Engagement, and Open Strategy

In today's business world, stakeholders represent a key component of any organization. These individuals can provide valuable input into decisions that affect the company, and, in turn, their concerns must be heard and addressed during the decision-making process. "Stakeholder engagement refers to the aims, activities, and impacts of stakeholder relations in a moral, strategic, and/or pragmatic manner" (Kujala et al., 2022, p. 1139) and focuses on participation (how do they participate?), inclusion (who is included?), and democracy (why do they have the right to some form of decision-making power?), which aligns with the topics discussed in the open strategy field, to unpack the complexity of stakeholder engagement (Mori, 2010; Wenzel et al., 2022). stakeholder engagement is the process of building and maintaining relationships with these groups and creating a forum for two-way communication and transparency. As organizations become increasingly complex and interconnected, managing these interactions can become a challenging task that requires the appropriate tools, resources, and strategies.

As such, open strategy is closely related to the stakeholder engagement research field, as both the literature on business and society and management and strategy overlap (Kujala et al., 2022, p. 1140). In open strategy, both constructs (inclusion and transparency) could extend beyond the boundaries of the organization, such as is the case with open innovation (Chesbrough & Appleyard, 2007) and stakeholder collaboration in stakeholder engagement; these constructs are in contrast with traditional strategy-making, which is considered an exclusive practice of top management in organizations (Barney, 1991; Birkinshaw, 2017; Chandler, 1962). open strategy is part of a larger movement in management and business that aims to break down traditional barriers between organizations and the people who interact with them. stakeholder engagement and open strategy processes have become increasingly important as organizations strive to

become more diverse and inclusive in their decision-making. This is particularly true for large organizations that need to ensure that their decisions are well-informed, comprehensive, and effectively managed. However, managing complex stakeholder engagement and open strategy processes can be daunting. How can one ensure that all stakeholders are engaged in a meaningful manner? How does one ensure that decisions are informed by the varied perspectives of those involved?

Organizations are increasingly embracing stakeholder engagement and open strategy processes. However, these approaches can also introduce new levels of complexity, which can be difficult to manage. In order to successfully navigate these complexities, it is important to have a clear understanding of what they are and how they can impact organizations. There are three types of complexity when it comes to stakeholder engagement and open strategy processes: organizational, strategic, and technical. Organizational complexity refers to the number of stakeholders involved and the different levels of authority and responsibility within an organization. This can make it difficult to coordinate activities and have everyone on the same page. Strategic complexity has to do with the goals of the organization and how best to achieve them. There may be conflicting objectives or different ways of going about things. This can make it difficult to develop a clear strategy that everyone can agree on. Technical complexity is about the details of how something works or needs to be done. This can include things like information technology systems, regulations, human resource management, or data collection and analysis. It can be challenging to ensure that everything is working correctly and efficiently.

Thus, the following sub-research question is posed: “How can organizations manage the complexity of stakeholder engagement and openness in their strategy-making processes?” and will be explored in the first standalone article presented in Chapter 4 of this thesis.

Inclusion in Open Strategy: Sense of Belonging and Authenticity

Previous research on the organizational implementation of CSR has found that “the declining importance of the corporate social responsibility manager may indicate that corporate social responsibility itself has been successfully embedded in the firm” (Risi & Wickert, 2017, p. 615). However, research has revealed that there is not necessarily a link between the number of people engaged in CSR and the level of advancement in CSR (Risi & Wickert, 2017). Therefore, at this point, we could ask ourselves whether embedded CSR implies that every employee becomes likeminded regarding why, where, when, and how to engage in CSR or whether it implies that it is integrated on all levels of strategy and in all departments of the organization.

As the emphasis has mainly been on “including” the largest number of people in the process (Bjelland & Wood, 2008; Denyer et al., 2011; Heracleous et al., 2018; Seidl & Werle, 2018), without much regard to how these people would interact together, open strategy initiatives emerge; however, despite the sincere commitment and will of open strategic processes, there comes an end to the process itself as well as its openness. Open strategy challenges the traditional perspective on strategy, as it aims to include traditionally excluded participants in the process and has been defined in the literature as having two main guiding principles—that of transparency and inclusion—both internally and beyond the boundaries of the organization (Chesbrough & Appleyard, 2007; Whittington et al., 2011). Openness is expected through a wider set of perspectives on the organization’s *raison d’être* to improve strategic decisions (Seidl et al. 2019a, p. 17).

Organizations often open up only to internal participants, including their employees in early stages of the open strategy and then face the tensions and dilemmas of adopting an open

strategy (Hautz, 2017), thereby leading to exclusions to regain control of the process and managing its complexity. Therefore, adopting a different perspective to examine inclusion in open strategy can add to the conceptualization of openness in open strategy. The definition given by Jansen et al. (2014, p. 373), who define inclusion as “the degree to which an individual perceives that the group provides him or her with a sense of belonging and authenticity,” has guided the next research question in this thesis. Here, introducing the nuance of inclusion not being participation and inclusion not being the opposite of exclusion can help in understanding the dilemmas and challenges arising from greater openness and enable organizations to shape open strategy processes by actioning other levers that can contribute to higher inclusion.

Considering these aforementioned aspects, the following research question is proposed: “How can organizations enhance participant inclusion in open strategy processes and leverage the interplay between inclusion and transparency in strategy initiatives?” This question is addressed through the second standalone article developed within this thesis in Chapter 5.

Strategy Implementation, Artifacts, Commitment, and Open Strategy

Ineffective communication is the foremost barrier to strategy implementation (Heide et al., 2002). The lack of ownership and shared understanding of the strategy are also cited among the reasons for unsuccessful implementation (Aaltonen & Ikävalko, 2002; Seidl et al., 2019a), which emphasizes that implementation is about the transformation of the reality of those who are part of that organization (Merkus et al., 2019). Thus, middle managers play a significant role in strategy execution; however, numerous insights remain to be explored regarding the role of various actors beyond the top management team (Balogun & Johnson, 2005). To foster

commitment in strategy implementation, attention must be given to communication, transparency, and inclusion (Werle & Seidl, 2015; Whittington et al., 2011). Commitment to strategy is crucial for effective implementation, but has not received sufficient research attention (Nketia, 2016).

According to Gast and Zanini (2012, p. 8), “many organizations struggle with strategic alignment: even at the healthiest companies, about 25 percent of employees are unclear about their company’s direction” and that “making the vision meaningful to employees at a personal level” and “soliciting employee involvement in setting the company’s direction” are what organizations can do best to align individuals with the direction of the organization. Thus, exploring how a strategy is consumed and influenced by those lower down in the organizational hierarchy and translated into the day-to-day practices that create strategy and change (Balogun et al., 2003, p. 199) is a promising research avenue. Strategic plans generally describe what to do, not how to do it (Seidl et al., 2019b, p. 197) and an organization’s strategic capabilities are developed and embedded in its employees.

Thus, the recent call for more research on the materiality of strategy work as part of implementation and examining the tools and frameworks mobilized or created for activities in strategy work (Friesl et al., 2021, p. 27) is justified. Research on how materiality and artefacts impact strategy implementation is scarce (Leonardi, 2015). This thesis aims to address this gap by investigating the materiality of artefacts in the implementation phase of a strategy developed through an open strategy initiative in a multinational organization. In addition, this research aims to obtain a comprehensive understanding of the factors influencing strategy implementation and how artefacts contribute to building commitment among employees (Friesl et al., 2021).

The strategy-as-practice (SAP) perspective emphasizes the social and material practices involved in strategy formulation and execution (Johnson et al., 2003; Rouleau, 2005). Materiality plays a significant role in strategy work, with strategy tools, objects, technologies, built spaces, and human bodies being integral to organizational practices (Dameron et al., 2015).

Understanding the materiality of artefacts and their role in communicating strategic plans and building commitment is essential for a comprehensive understanding of strategy implementation. Thus, the following is the third sub-research question of this thesis: **“How does materiality support organizational commitment in the implementation phase of strategy?”** This question is explored in the third standalone article developed in this thesis and is presented in Chapter 6.

Cumulative Insights from the Three Standalone Articles

The various articles brought together discuss the multifaceted nature of open strategy and its importance in various phases of strategic development and implementation. It emphasizes that open strategy goes beyond stakeholder involvement, encompassing complexity related to transparency, inclusion, materiality, and commitment throughout the strategic process. Effective management of this complexity requires specific tools, an understanding of trust, and dynamic relationships between elements involved in open strategy. Organizational adaptation and purposeful tools are highlighted as crucial in navigating this complexity successfully.

Furthermore, the articles present a holistic approach to open strategy, where facilitation, trust, and commitment play integral roles. They underscore the need for organizations to balance these elements to create an environment conducive to stakeholder engagement, transparency, and

dedicated strategy execution. Collaboration among facilitation, trust-building, and connector roles is seen as enhancing open strategy's effectiveness.

Additionally, the interplay between transparency and inclusion is explored, challenging conventional thinking by showing how transparency and exclusion can paradoxically enhance the perception of inclusion. Material artifacts are discussed as tangible mediators of transparency, fostering a sense of belonging even for excluded stakeholders. This dynamic emphasizes the potential for organizations to create a more inclusive strategic environment through the management of transparency and material artifacts.

Lastly, the articles developed in this thesis emphasize that openness alone is insufficient, and it must be complemented by thoughtful structuring and inclusive engagement to ensure effective strategy execution. Striking a balance between openness and structured execution allows organizations to leverage stakeholder engagement and internal commitment to turn strategic intentions into tangible results.

Overview of Chapter Contents

Before we move on to the heart of the discussions, I would like to give the reader a thorough summary of this thesis and lay out the topics that will be covered in the subsequent chapters.

In Chapter 1, the overall context was established and the key concepts were developed. Connecting openness, strategy, and CSR and providing an overview of the general research question of the thesis (“How can open strategy practices support the formulation and implementation of an organization’s socially responsible corporate strategy?”). How this research question will be addressed in three distinct articles, with each article addressing a sub-research question is then discussed. The first theoretical article examines complexity, stakeholder engagement, and open strategy. The second article explores inclusion in open strategy through a sense of belonging and authenticity, and the third article develops commitment to strategy implementation in an open strategy setting; both articles are based on a single longitudinal case study.

In Chapter 2, the concept of CSR is introduced and its importance in relation to open strategy and stakeholder engagement is emphasized. This chapter investigates the dynamics of open strategy in organizations, with a focus on internal actors such as employees, who play an important role in the early phases of open strategy but also face difficulties and challenges. Sustainability, stakeholder engagement, and CSR have grown in relevance in recent decades, thereby evolving from a secondary business consideration to an essential component of strategic management. The chapter also examines the factors that influence the involvement of CSR and the role of individuals within firms in overcoming internal CSR hurdles and conflicts. For future

research, the chapter highlights stakeholder engagement, which is defined as building and maintaining mutually beneficial connections with individuals and groups within and outside the company who are interested in the company's success. Overall, the purpose of this chapter is to bridge the gap between the literature on open strategy, stakeholder engagement, and CSR by acknowledging the interdependence of openness aspects and the rising importance of CSR in determining organizational strategies and practices.

In Chapter 3, the numerous elements of the research process are described. The research philosophy is explored first, inscribing the thesis within a constructivist epistemology, followed by its implications for the research methodology. The theoretical approach is then expanded on, with an emphasis on the evolution of strategic management and its practice turn as well as validating the location of the thesis within the strategy-as-practice theoretical approach. Following the establishment of the research approach, the methodology used and the justification for selecting a longitudinal single-case study are presented. The case study that was utilized to produce articles 2 (Chapter 5) and 3 (Chapter 6) is then presented in order to provide a full interpretation of the research setting, thereby highlighting the complete strategy process that HomeCo has adopted since 2019. Finally, data collection and analysis methods and procedures are explained.

In Chapters 4, 5, and 6, the three articles that were created during the course of this thesis are presented. Article 1 presents and recommends the concepts of structure, purpose, and neutrality as a means to examine and steer open strategy processes. It emphasizes facilitators and the role of facilitation as key components to opening up organizations and guiding the process through structure, purpose, and neutrality in order to answer the research question of 'how organizations can manage the complexity of stakeholder engagement and openness in their

strategy-making processes.” Article 2 explores the notion of inclusion and a fuller understanding of it is developed via the perspective of belongingness and authenticity. The findings indicate that trust, the sense of significance, and temporality are important in fostering inclusion, thereby offering insight into the main investigation of how companies might support participant inclusion within an open strategy process. Article 3 focuses on the implementation phase of the strategic process. This is accomplished by investigating the materiality of open strategy artefacts and analyzing how these factors affect commitment to strategic implementation, thereby demonstrating that organizations can use three levers to develop stakeholder commitment: knowledge, ability, and willingness; this provides an explanation for the formulated research question of how materiality supports employee commitment during the strategy implementation phase. Each of the three papers contribute to answering the main research question of the thesis.

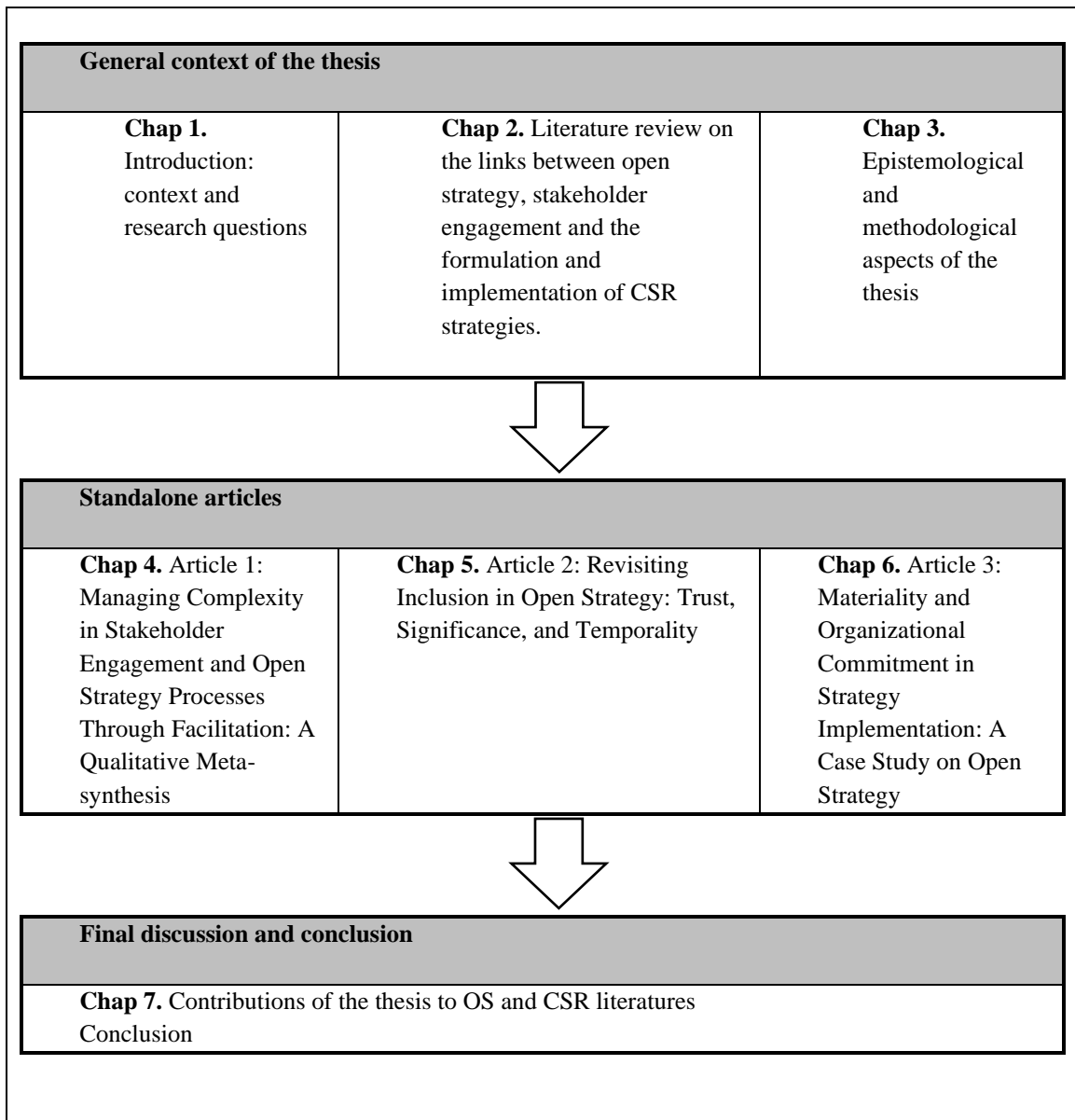
In **Chapter 7**, the interconnectedness of three articles developed in the thesis is explored, thereby revealing a unified analysis of open strategy dynamics. The research and articles collectively emphasize that open strategy entails multidimensional complexity, extending beyond stakeholder involvement to encompass transparency, inclusion, materiality, and commitment throughout the strategic journey. This complexity demands specialized tools, trust-building, and effective facilitation. The articles also shed light on the intersection of organizational complexity and purposeful tools, illustrating the need for adaptation and orchestration. They unveil a holistic approach to open strategy, where complexity is acknowledged, trust is fundamental, and commitment propels progress. The collaboration among facilitation, trust-building, and connector roles is emphasized as vital for open strategy effectiveness. Transparency and inclusion are explored as a nuanced relationship, highlighting the role of material artefacts in fostering inclusivity. Ultimately, the chapter underscores that openness must be complemented

by structured execution for successful strategy implementation, offering actionable insights for organizations navigating the dynamic realm of open strategy. Finally, a conclusion offers the key insights developed in this thesis and opens avenues for future research.

A summary of the content of all chapters is presented in [Figure 1](#) below.

Figure 1

Overview of the Chapters and Thesis Structure



Chapter 2. Literature Review, Key Concepts, and Definitions

This chapter explores the complexities of open strategy within organizations, highlighting the vital role of internal actors, particularly employees, in its early stages. It also introduces Corporate Social Responsibility (CSR) and its significance in the context of open strategy and stakeholder engagement, emphasizing the evolving importance of sustainability, stakeholder engagement, and CSR in strategic management. The chapter examines the determinants influencing CSR engagement and underscores the contributions of individuals within firms in overcoming internal CSR challenges. It delves into stakeholder engagement, emphasizing the cultivation of mutually beneficial connections with individuals and groups both inside and outside the organization. In essence, stakeholder engagement serves as a crucial link between open strategy and CSR by facilitating transparency, accountability, responsiveness to stakeholder concerns, and the integration of ethical and sustainable practices into strategic decision-making. It ensures that organizations consider the broader societal and environmental context in which they operate, aligning their strategies with the interests of stakeholders while striving for responsible and sustainable business practices. The overarching aim is to bridge the gap between open strategy, stakeholder engagement, and CSR literature, recognizing the interconnectedness of these concepts and their profound impact on organizational strategies and practices. Additionally, the chapter stresses the importance of transparency as a foundational element of openness in organizations and discusses various approaches to open strategy initiatives. In summary, this chapter unravels the intricate connections between open strategy, CSR, and stakeholder engagement, shedding light on the roles of individuals, the evolution of CSR, and the multifaceted nature of stakeholder relations. It offers valuable insights into the complex landscape of organizational strategies and practices in today's business world.

2.1. Openness, Open Organizing, and Open Strategy

The introduction of a special issue on open organizing in *Organization Studies* (Splitter et al., 2023) begins by stipulating that our culture is becoming more open as a result of the rise of various societal values such as democratization, liberalization, accountability, and equal opportunities; the rise of social software that facilitates connectivity, self-organizing, and community development; and the growth of wicked problems, which are problems that are complex and indeterminate and require input from a variety of viewpoints as well as collaboration among a number of different partners. These trends have been a driving force behind the development of openness across a range of different organizational activity categories, and it is because of such trends that organizations are becoming more transparent. Just a few of the open organizational domains that are becoming more prominent in the modern world are open data, open education, open government, open innovation, open platforms, open research, open source, and open strategy.

Openness attempts to break down boundaries between people and groups by enabling them access to each other's knowledge and experience. Openness can be understood as something that does not merely constrain but also enables organizations, thereby pictured as a humanistic ideal, an organizing principle that is ethically superior to the principle of closedness or portrayed as an efficient mode of production (Heimstädt & Reischauer, 2017).

Open organizing is a new means of working that is defined as a “dynamic organizing principle along the primary dimension of transparency/opacity (of information) and secondary dimensions of inclusion/exclusion (in organizational decision processes) and distributed/concentrated (actual) decision rights” (Splitter et al., 2023, p. 17). Although openness

has multiple definitions and perspectives on it, depending on the domain in which it is used or analyzed, the common higher-level definition proposed offers a comparison point throughout the various domains ([Table 2](#)).

Table 2

Dimensions of Openness in Organizational Domains (adapted from Splitter et al., 2023, p. 8)

Domain/Openness Search Phrase	Summary domain definition of openness	Transparency	Inclusion	Decision Rights
Open Data	Providing data publicly	Primary	Secondary	Marginal
Open Education	Providing educational knowledge	Primary	Secondary	Marginal
Open Government	Providing government data publicly	Primary	Primary	Marginal
Open Innovation	Using inflows and outflows of knowledge	Primary	Primary	Marginal
Open Platform	Accessing digital platforms	Secondary	Primary	Marginal
Open Science	Involving the public in science	Primary	Primary	Marginal
Open-source Software	Collectively developing and using software released under an open source-style license	Primary	Secondary	Secondary
Open Strategy	Sharing strategic insights and participating in strategy process	Primary	Primary	Secondary

On the basis of the primary features of openness as an organizing principle as well as the examination of the literature on openness, Splitter et al. (2023, p. 14) have identified four types of difficulties that acquire relevance across the domains that are covered in [Table 2](#): design challenges along classic issues of organization design (structure, systems, etc.); epistemic challenges that are concerned with the sharing of knowledge within and between organizations; normative challenges, which respond to shifts in contemporary values; and political challenges, which deal with the realities of power in organizations. Thus, open strategy, which is at the heart of this thesis, also faces these challenges and complexities that arise when more openness is introduced in the strategy process. In the next section, an overview of open strategy is provided,

discussing the benefits and challenges of open strategy, its definition, and an understanding of its principal components: inclusion and transparency.

2.1.1. An Overview of Open Strategy

Open strategy is a recent research topic in the field of strategic management, which has gained significance amongst academics over the last decade. There are various founding elements to open strategy; the first one is the study of Chesbrough and Appleyard (2007), who put a name to this phenomenon and gave it a primary definition. The authors first mentioned open strategy through open innovation research; thus, their first take on the definition of open strategy is closely related to the conception of open innovation. They defined open strategy as being the means through which an organization delivers open innovation. Their view suggests that open strategy structures business models and interactions among a community of innovators, creative individuals, and collaborative initiatives. One of their main arguments is that organizations should not lose sight of capturing value within the process of value creation to be sustainable. Where Chesbrough and Appleyard's definition is orientated to external practitioners (who are central to the core of open innovation), Whittington et al. (2011) define "openness" in open strategy through the characteristics of transparency (related to the communication of strategy) and inclusion (related to the people involved), with an emphasis on internal practitioners.

A) Three Dimensions of Open Strategy: Transparency, Inclusion, and Decision-making.

Even though the two main constructs of open strategy—inclusion and transparency (Hautz et al., 2017; Whittington et al., 2011)—have been previously present in the debates of strategic management literature, the societal, cultural and organizational changes in today’s world mark a step toward more openness (Seidl et al., 2019b). Open strategy challenges the traditional view on strategy, as it aims to include traditionally excluded participants in the process, both internally and beyond the boundaries of the organization (Chesbrough & Appleyard, 2007; Whittington et al., 2011). This shift toward openness implies a more participatory form of strategy, where strategies are created through dialogue among multiple stakeholders. Thus, open strategy opens new possibilities for strategizing, as it allows the core values and beliefs from different actors to come together and shape a mutually beneficial outcome.

Inclusion in open strategy is mainly defined as “the participation in an organization’s ‘strategic conversation’, the exchanges of information, views, and proposals intended to shape the continued evolution of an organization’s strategy” (Whittington et al. 2011, p. 536). Thus, the intention is to consult a wider range of people who are traditionally excluded from the “strategic conversation” and to go beyond the boundaries of the organization to widen the pool of people involved. In addition, it also implies an increase in transparency, as in the “visibility of information about an organization’s strategy, potentially during the formulation process but particularly with regard to the strategy finally produced” (Whittington et al., 2011). Specifically, the concept of open strategy implies that traditionally excluded participants can become involved in strategic matters and decisions by providing their input. It also attempts to move away from

the traditional non-transparency of strategic decision-making toward a more collaborative approach. Furthermore, it is highly supportive of participation efforts on various levels within organizations, as it encourages alternative voices from all sides of an organization to participate in setting goals and finding ways to achieve them collaboratively (Mack & Szulanski, 2017). This also has implications on management practice, as open strategy requires higher-level managers to consider how their decisions will be perceived by lower-level managers, employees, and external stakeholders when including them in the process.

Finally, Tavakoli et al. (2017) developed an ideal-typical definition in their paper aimed at consolidating the knowledge on open strategy and added to the previous concepts that open strategy is IT-enabled and enacted in context-dependent praxis episodes. “Open strategy is a practice that involves upper echelon and non-upper-echelon organizational members as well as stakeholders from outside the organization. Practitioners of open strategy draw upon sets of both traditional strategizing practices as well as open practices (transparent discourse, co-creation, and democratic decision-making). The latter set of practices is based on norms of inclusiveness and transparency and is enabled by IT. Open strategy is enacted in context dependent praxis episodes over time.” (Tavakoli et al., 2017, p. 178). Moreover, in their definition of open strategy, they include the notion of democratic decision-making—which is refuted by several authors—thereby arguing that openness is related to sharing information, knowledge, and views and that the decision rights are not shared (Whittington et al., 2011) and open strategy is not democratic strategy (Hautz et al., 2017).

Even though openness can assume different forms in different domains, through various levels of either transparency, inclusion or decision rights, the logic is to prioritize transparency as it is the basis of most forms of openness in organizations. “With openness referring typically to

greater transparency for information and contingently to wider inclusion in processes and greater access to decision rights” (Splitter et al., 2023, p. 13), transparency is key to enable both or either inclusion or decision rights.

In this manner, processual openness is about setting the rules and procedures upfront to avoid individuals making changes during the process. However, closure in open processes is unavoidable; in order to enable certain forms of openness, complementary forms of closure are required (Dobusch et al., 2019, p. 345). In the process of moving through openness and closure, several dilemmas emerge—such as the dilemma of process, commitment, disclosure, empowerment, and escalation (Hautz et al., 2017)—which often result in exclusionary practices to lower the levels of openness and lower the tensions arising from these dilemmas. These exclusionary practices are closely related to the fact that overall open strategy is driven by upper echelon leaders, which sits in line with the fact that Whittington et al. (2011, p. 535) find that “open strategy does not extend to the transfer of decision-making rights with regard to strategy.” However, when it comes to decision-making and control over the said open initiative, often consultants (Baptista et al., 2017; Dobusch & Dobusch, 2019; Tavakoli et al., 2017), by designing and/or facilitating the process, or IT developers (Aten & Thomas, 2016; Hautz et al., 2017), by managing and developing the digital platforms, retain a large part of it.

B) The Expected Benefits of Open Strategy.

Openness is expected to improve strategic decisions by confronting a wider set of perspectives on the organization’s *raison d’être* (Seidl et al. 2019a, p. 17). The dominant logic (Prahalad & Bettis, 1986) of top management’s cognitive models in organizations is challenged

by introducing more openness in strategy; with such openness come several benefits (Seidl et al., 2019b), such as the possibilities of collective intelligence and innovation, increased legitimacy and brand loyalty (Gegenhuber & Dobusch, 2017; Luedicke et al., 2017; Mantere & Vaara, 2008; Morton et al., 2018; Stieger et al., 2012; Yakis-Douglas et al., 2017), interorganizational sensemaking (Seidl & Werle, 2018; Van der Steen, 2017), greater access to information and knowledge (Amrollahi & Rowlands, 2017; Malhotra et al., 2017; Regnér, 2003; Whittington, 2019), and in terms of strategy implementation (Denyer et al., 2011; Stieger et al., 2012). Furthermore, organizational success is likely to increase due to improved trust amongst involved parties.

Although numerous benefits have been associated with opening the strategy-making process, the literature places a substantial focus on the problems that arise with the inclusion of a wider set of participants, such as the dilemma of process (relates to the fact that including wider audiences in the strategy process has ambivalent effects), dilemma of commitment (refers to the fact that open strategy can both increase and decrease commitment to the organization's strategy), dilemma of disclosure (refers to the fact that greater transparency regarding the strategy process and its outcome has numerous advantages but also carries significant risks), dilemma of empowerment (refers to the fact that the inclusion of wider audiences in the strategy process can be seen both as a blessing and a burden by participants), and the dilemma of escalation (refers to the fact that once organizations begin opening up their strategy process in selective dimensions and domains, pressures are created for other dimensions and domains to be opened up as well) (Hautz et al., 2017, pp. 8–11). Along these lines, several challenges have been outlined (Seidl et al., 2019b), such as increased transparency (Appleyard & Chesbrough, 2017; Mack & Szulanski, 2017), stakeholder pressure, complexity of open strategy (Malhotra et

al., 2017), and stakeholder commitment (Seidl & Werle, 2018; Stieger et al., 2012). As the literature is still nascent, numerous factors that influence the level of openness in open strategy initiatives are being discussed, brought to light, and refined. Debates are arising around the levels of participation (Mack & Szulanski, 2017), the nature of people participating (crowds and communities) (Dobusch & Kapeller, 2018), the processes of decision-making (Whittington et al., 2011; Hautz et al., 2017), and even the role of information systems (Morton et al., 2017). Seidl et al. (2019, p. 17) suggest that “the research agenda starts with who to mobilize and how to empower, in order truly to challenge conservatism.”

2.1.2. Refining the Understanding of Inclusion in Open Strategy

However, “the who to mobilize and how to empower” depends on the approaches of the open strategy initiative being either conceived as (1) limited participation (although the term “open strategy” implies that there is extensive transparency and inclusion in the strategy-making process, most real-world examples and practices reveal how open strategy may incorporate transparency and inclusion only in certain aspects of the strategy process but not in others), (2) co-creation (widespread participation in the co-creation of strategies may be used as a basis for the development of strategies as opposed to restricting participation to particular phases of the strategy process; co-creation of strategies, as opposed to more limited participation, is premised on the notion that participation is not limited to providing information or ideas but also to having a “real” impact on the organization’s strategy), or (3) deep engagement (according to this perspective, the actors—not just the top or middle management—jointly work on the strategies as well as establish and modify the structure of strategy processes) (Vaara et al., 2019, pp. 8–11). Generally, open strategy lacks openness as to “the variety of the different groups of people

whose contributions will be treated as meaningful” (Dobusch et al., 2017, p. 9), as in most cases the strategy-making initiatives qualify more as limited participation (Vaara et al., 2019), which contrasts with Whittington et al.’s (2011) definition of inclusion. Existing research provides a starting point for further understanding the complexities of open strategy and how to successfully implement it. Key elements such as legal aspects, corporate culture, and multistakeholder participation models will be critical to maximize the benefits arising from its initiatives. Open strategy has potential value in addressing complex challenges faced by companies or organizations across different industries. However, it is important to keep in mind that open strategy should integrate knowledge from different actors with complementarity of individual experience (Mura et al., 2016). In doing so, both the microcosm of internal procedures and external relationships must be taken into consideration, as individual stakeholders have multiple interests beyond their own careers. It is through this dialogue between publics that meaningful insight can be generated, ultimately resulting in strategies that are beneficial for all parties involved.

A) Various Levels of Inclusion: From Episodic Participation to Ongoing Conversations.

Open strategy is not a binary phenomenon, but rather a continuum, where open strategy processes can be more or less open in both inclusion and transparency (Whittington et al., 2011). However, this definition brings with itself a level of confusion, as the terms “participation” and “inclusion” are used interchangeably in the open strategy literature (Mack & Szulanski, 2017). Mack and Szulanski (2017) suggest that organizations can manage the tensions arising from greater openness in the process of strategy-making by differentiating and managing the level of

engagement of stakeholders in participatory and inclusive practices. They suggest that “participation is about increasing stakeholders’ input for decisions (information-collection activities), and inclusion is about creating and sustaining a community of interacting stakeholders engaged in an ongoing stream of issues in the strategy process (work groups or task forces, with information sharing, interactions and joint decision-making)” (Mack & Szulanski, 2017, p. 386). In other words, inclusion refers to a long-term engagement, where practitioners are involved through various stages of the strategy-making process and where the focus is set on “making connections” between their ideas and perspectives; whereas participation is a more short-term or even a one-time engagement, where practitioners adopt the role of informational input. Thus, when compared to Whittington et al.’s (2011) view of inclusion, we can see a clear difference in the usage and understanding of this word. For Whittington et al. (2011), inclusion is about the range and diversity of practitioners involved, while Mack and Szulanski (2017) indicate that inclusion is about the role played by and the level of engagement of the practitioners.

B) Quantity in Inclusion: From Small Groups to Large Crowds.

Dobush and Kapeller (2018) investigated whether there is a difference between crowds and communities, within open strategy and particularly if the dynamics or dilemmas of open strategy brought forward by Hautz et al. (2017) could benefit from this differentiation. The authors define crowds as actors who do not share interpersonal ties but are mainly related to the organization in some form or another; moreover, they define communities as networks of interrelated actors who may engage in interpersonal exchange and share social ties or a common identity beyond an

open strategy-making process. One of their findings is that communities strive for greater openness in contrast to crowds who favor limited openness. Thus, communities urge for more inclusive practices (reviewing practices or democratic practices such as decision-making), while the tendency with crowds is opposite; in other words, they do not urge for long-term involvement (keen on participatory practices, such as exclusive or reporting practices) nor do they ask to participate in decision-making processes. Thus, we can conclude that participatory practices are more adapted to crowds and that inclusive practices are more adapted to communities, which is in keeping with Mack and Szulanski's (2017) understanding of both inclusion and participation. However, it cannot be said that inclusive practices cannot be successful with crowds, nor that participatory practices cannot be successful with communities; although as mentioned by Dobush and Kapeller (2018), open strategy practices should be adapted to the practitioners in order to mitigate the tensions arising from them.

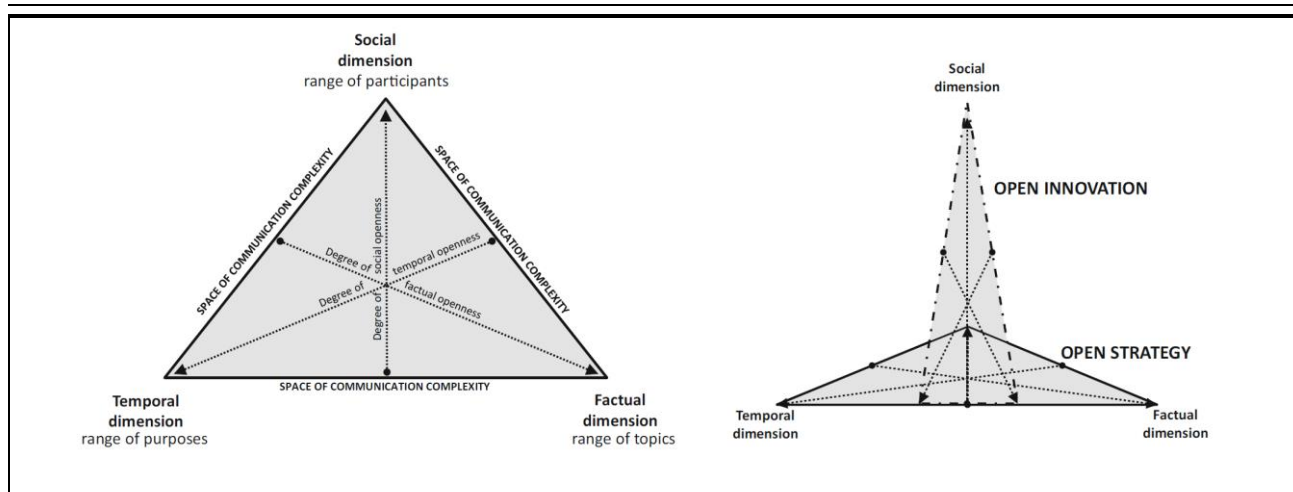
C) Various Types of Inclusion: From Groups of Clones to External stakeholders with Various Interests and Competences.

In numerous cases in the literature of open strategy, the emphasis has been on “including” the largest number of people within the process (Bjelland & Wood, 2008; Denyer et al., 2011; Heracleous et al., 2018; Seidl & Werle, 2018), without much regard to how these people would interact together. It was found that in most cases, open strategy has a high degree of openness regarding the factual dimension (“the range of different topics that can be discussed”) and the temporal dimension (“the capability to integrate different purposes”), thereby enabling a great variety of topics and purposes within the strategy-making initiatives (Dobusch et al., 2017, p. 9). However, open strategy lacks openness in the social dimension (“the variety of the different

groups of people whose contributions will be treated as meaningful” (Dobusch et al., 2017, p. 9), as a majority of cases reveal that the strategy-making initiative is open only to internal practitioners (Figure 2), which is in contrast to the aspiring characteristic of inclusion defined by Whittington et al. (2011), whereas open innovation is highly dependent on external practitioners, but is usually focused on a specific topic and purpose throughout the initiative.

Figure 2

Model of Communication Complexity (Dobusch et al., 2017)



Organizations often open up only to internal participants, including their employees in early stages of open strategy and then facing the tensions and dilemmas of open strategy (Hautz, 2017), thereby leading to exclusions to regain control of the process and managing its complexity. Moreover, these dimensions of openness have been found to have an interdependent relationship (Dobusch et al., 2017); in other words, when one factor increases toward a higher level of openness, it is expected that the other two factors evolve respectively, unless they are explicitly limited to a lower degree of openness.

2.1.3. Sustainability, Stakeholder Engagement, and Corporate Social Responsibility

Sustainability, stakeholder engagement, and CSR are part of such societal and cultural values that have risen in the last few decades and push toward more openness, thereby forcing organizations to adapt themselves, reinvent themselves, and evolve through and with technological means and organizational structures, processes, and practices. Transparency is a theme that pervades numerous current sociopolitical conversations. In light of corporate scandals such as Enron's demise and Volkswagen's manipulation of emissions testing, as well as leaks and whistleblower events such as the Snowden and Wikileaks cases, crucial stakeholders are increasingly demanding transparency in business and political operations (Albu & Flyverbom, 2019).

Over the course of the last 10 years, the concept of CSR has emerged as an essential topic, but the idea that businesses should contribute to improving society has been around for quite some time. One of the first definitions that is analogous to CSR appeared in the early 1950s ("the obligations of businessmen to pursue those policies, to make those decisions, or to follow those lines of action which are desirable in terms of the objectives and values of our society"—Bowen, 1953, p. 6). Over the course of time, CSR has gained importance and attention among researchers, corporations, governments, and a significant section of the world's population. Instead of being something that is in addition to regular business, CSR has moved into the realm of strategic management in the modern business world and it has become an important topic in the day-to-day operations of businesses (Maon et al., 2010). Thus, CSR is defined in the following manner: "Corporate social responsibility is a management concept whereby companies integrate social and environmental concerns in their business operations and interactions with

their stakeholders. Corporate social responsibility is generally understood as being the way through which a company achieves a balance of economic, environmental, and social imperatives ('triple-bottom-line- approach'), while simultaneously addressing the expectations of shareholders and stakeholders." (UNIDO, 2023).

The existing body of literature has, over the course of its existence, amassed a great number of distinct organizational models that each reflect a particular level of corporate social responsibility. The research conducted by Maon et al. (2010) classifies and summarizes these various models into a general model with three main stages. These stages are referred to as CSR cultural reluctance, which occurs "when corporate social responsibility gets ignored or considered only in terms of constraints," CSR cultural grasp, which takes place "during which organizations become familiar with corporate social responsibility principles," and CSR cultural embedment, which takes place "when the organizational culture fully embraces morally based corporate social responsibility" (Maon et al., 2010, p. 29).

Compared to what Aguinis and Glavas (2013) refer to as peripheral and embedded CSR are the latter two stages of the model developed by Maon et al., (2009). The first stage is one in which businesses do not integrate CSR into their fundamental activities, organizational structures, strategic endeavors, or operational procedures. At this point, firms have also reached the stage of compliance, which implies they are only putting into practice what is mandated by the law. Bansal and Roth (2000) revealed similar findings and found that the decision-making process of certain managers is based on limiting the costs and risks of noncompliance. However, numerous businesses that find themselves in this stage frequently use CSR as a public relations tool for brand image (Aguilera et al., 2007). Alternatively, as Sonenshein (2016) suggested, this is due to the fact that enacting upon corporate social responsibility related topics is also

contributing to the financials of the corporation. According to the argument made by Weaver et al., (1999), organizational practices like CSR are liable to evolve in different directions over time. In other words, certain businesses use them for the purpose of “window-dressing,” while others incorporate them into the overall strategy and core principles of the organization.

On the other hand, embedded CSR differs from peripheral CSR in that it is fully incorporated into all the activities of the organization. Nevertheless, one needs to think in a very different manner in order to approach CSR in this manner. Furthermore, there are numerous examples of companies who participate in CSR activities by either incorporating them into their business strategy or their day-to-day operations and practices. However, these companies do not do both. In this scenario, CSR exists on the periphery rather than being embedded (Aguinis & Glavas, 2013). The manner in which people think about CSR is evolving. Despite this, only a small percentage of businesses currently have CSR embedded into their operations.

A) Stakeholder Engagement and Organizations.

Stakeholder engagement refers to the aims, activities, and impacts of stakeholder relations in a moral, strategic, and/or pragmatic manner (Kujala et al., 2022, p. 1160). Stakeholders must be understood as individuals, groups, or organizations that affect or are affected by organizational activities (Freeman, 2010). Related constructs of stakeholder collaboration (joint activities with external stakeholders), stakeholder inclusion (presence of stakeholders in organizational activities), and stakeholder democracy (participation of stakeholders in the processes of organizing, decision-making, and governance) closely link open strategy and stakeholder engagement together, each having their own nuances (Desai, 2018; Kujala et al., 2022; Matten & Crane, 2005). In other words, stakeholder engagement is defined as

the process of establishing and maintaining mutually beneficial relationships within an organization with individuals and groups outside the organization who are interested in or have a stake in the organization's success. The goal is to foster open communication and transparent decision-making between these groups throughout the various phases of the company's development. Stakeholders can be either internal or external to the company. Internal stakeholders include members of the company itself, such as employees, senior management, and members of the board of directors. External stakeholders may include customers, suppliers, regulators, investors, or the general public. The construct of stakeholder inclusion (presence of stakeholders in organizational activities, by incorporating their perspectives and knowledge in improving value creation (Mitchell et al., 2015), is used to describe participation as defined by Mack and Szulanski (2017); moreover, stakeholder democracy describes the idea of inclusion as defined by the same authors. In contrast, while open strategy focuses on who's contributions are meaningful, stakeholder engagement focuses on "stakeholders' willingness to participate in business value creation" (Kujala et al., 2022, p. 1153). This slight nuance—where in the case of open strategy, it is the organization that retains the rights, and in stakeholder engagement, it is the participant who decides whether to include him/herself—merely emphasizes the interest of bridging both literatures, as the various perceptions of a similar topic in different domains can be rather insightful for either one of the literature streams.

In further bridging stakeholder engagement and open strategy on this point, we can examine how content-related openness (concerns all the actually performed activities related to access to sensitive information, the modes of participation and the modes of decision-making) and procedural openness (established and transparent processes in order to limit the likelihood for individual actors or informal groupings to modify "the rules" flexibly as the strategy-making

process develops) are used in a two-dimensional framework of openness by examining three defining elements of openness: (1) Access to sensitive information, (2) modes of participation, and (3) modes of decision-making (Dobusch et al. 2019, p. 364). Similar to open strategy, stakeholder engagement examines the modes of participation by taking into account stakeholders' willingness to participate in business value creation, thereby resulting in an improved performance, reputation, or competitive advantage (Kujala et al., 2022, p. 1153). In stakeholder engagement, recognition and respect (Noland & Phillips, 2010), doing good (Miska et al., 2014), empowerment of stakeholders (Ghodsvali et al., 2019), or the consideration of stakeholders' wants, needs, and capabilities (Todeschini et al., 2020) are considered to be necessary for stakeholder engagement to be morally positive (Kujala et al., 2022, p. 1153).

B) The Drivers for Corporate Social Responsibility Engagement.

Consequently, within the context of this study, it is essential to understand the various drivers of CSR engagement in order to determine which businesses are most likely to be taking steps toward integrating CSR. CSR engagement is defined as “an overarching concept of how firms combine the two key dimensions of CSR—(1) the primarily externally facing documentation of corporate responsibilities (‘talk’) and (2) the implementation of strategies, structures and procedures in core business processes within and across divisions, functions, value chains, etc., that facilitate corporate responsibility (‘walk’)” (Wickert et al., 2016, p. 1170). In addition, these factors will likely have an impact on the profiles of the personnel as well as the competences and abilities that are sought after by the department of human resources. On the other hand, these same factors also determine how they go about their day-to-day activities and how they will strive to influence the move toward embedded CSR. CSR participation can be driven by a variety

of factors, including legislative requirements, pressure from stakeholders, or the initiative of an individual (Bansal & Roth, 2000). Because compliance with the legal framework is obligatory, it serves as the foundation for CSR participation on any scale: local, national, or worldwide. Putting this aside, the growth in the bargaining power of consumers is one of the drivers behind the increasing importance for businesses to participate in CSR initiatives.

Today's society has the ability to exert pressure on businesses by demanding that they participate actively in CSR initiatives. An individual who participated in Bansal and Roth's (2000) research and interviews said, "We don't want to disappear if we can help it.... Firms which don't have a policy will end up going out of business because they won't be accepted by society." Finally, as was noted earlier, CSR actions can be part of ethical motivations, which in certain instances are tied to the personal beliefs of the company's founder or CEO, as well as the company's history, convictions, and philosophy (Vidal et al., 2015).

One of the most important steps for future research is to acknowledge the importance of the individual within a business in relation to the topic of CSR and the complexity of the issue (Wickert & De Bakker, 2016). This is because there may be internal barriers, constraints, and tensions that need to be resolved. As mentioned in Aguinis and Glavas (2013, p.315), academics look at corporate social responsibility via "various disciplinary and conceptual lenses," where "33% of publications focused on the institutional level, 57% on the organizational level, just 4% on the person level, and 5% addressed two or more levels." Thus, the individual-level research on CSR is relevant not only as a "gap filler" but also as an important addition to CSR knowledge (Aguinis & Glavas, 2013). This is due to the fact that at the end of the day, it is the individuals who strategize, make decisions, and are responsible for the execution of the strategies.

Consequently, even if there is a successful implementation strategy and due to a more complete education of future managers, which will likely enable a smoother adoption of corporate social responsibility policies, there may still be a role for the CSR manager. This role will involve measuring corporate social performance, communicating, and reporting about CSR activities, and enforcing corporate social responsibility policies. This is backed up by Wickert and De Bakker (2018, p. 65), who wrote that “given the different worldviews among different organizational members, adapting to counterparts’ worldviews also implies a tactical approach that depends on the corporate social responsibility managers' skills to connect to these different mindsets.” This finding lends credence to what was stated above. Anteby et al. (2016) explored the idea that professional groups such as the CSR department are driven not by their personal progress but rather by the relationships and tasks they build and execute that benefit the entire organization.

Chapter 3. Research Philosophy, Theoretical Perspectives, and Methodology

In this chapter, the research philosophy is explored first, inscribing the thesis within a constructivist epistemology, followed by its implications for the research methodology. Then, the theoretical approach is expanded upon, with an emphasis on the evolution of strategic management and its practice turn as well as validating the thesis's location within the strategy-as-practice theoretical approach. Following the establishment of the research approach, the methodology used and the justification for selecting a longitudinal single-case study are presented. The case study that was utilized to produce Articles 2 (Chapter 5) and 3 (Chapter 6) is then described in order to provide a full interpretation of the research setting, thereby illuminating the complete strategy process that HomeCo has been going through since 2019. Finally, data collection and data analysis methods and procedures are explained. The sampling technique for the qualitative meta-synthesis proposed in Article 1 as well as the interviews and observations and secondary elements obtained for Articles 2 and 3 are discussed. In addition, each article includes a full examination of how the data was used as well as a description of the grounded theory approach used to evaluate the data.

3.1. Research Philosophy: Constructivism in Business Research

The purpose of this section is to investigate constructivism in research philosophy in the context of business research, with a specific emphasis on interpretative constructivism. This research philosophy serves as the foundation of this thesis, driving the investigation into the subjective character of knowledge formation inside corporate organizations. This research attempts to understand how individuals within the organization interpret and make meaning of their experiences, interactions, and responsibilities by adopting an interpretative constructivist approach and shedding light on the intricacies of organizational life.

According to constructivism, knowledge is actively built by individuals based on their experiences, relationships, and social environment rather than being an absolute reality (Easterby-Smith et al., 2015). In the context of business research, this viewpoint recognizes that subjective interpretations and sensemaking processes of persons inside the company affect organizational reality (Easterby-Smith et al., 2015). Constructivism emphasizes the investigation of numerous viewpoints, the social creation of knowledge, and the dynamic character of organizational phenomena rather than pursuing universal principles or causal links. This approach aligns well with the nature of the overarching research question (“How open strategy practices can support the formulation and implementation of an organization’s socially responsible corporate strategy?”) and its sub-research questions and the focus on understanding the subjective aspects of organizational phenomena and the meaning-making processes of individuals within an organization.

3.1.1. Interpretive Constructivism: The Lens of Subjective Meaning-Making

Interpretative constructivism is an approach that examines the interpretive and sensemaking processes of individuals within an organization. It is a philosophical approach that recognizes the subjective aspect of reality and focuses on understanding how individuals generate meaning and interpret their experiences within the organizational setting, as well as the fact that organizational members do not passively absorb information. The research question is concerned with how open strategy practices, which involve the active participation of individuals within an organization, can contribute to the formulation and execution of socially responsible corporate strategies. Because it investigates the subjective aspects of reality and emphasizes how individuals generate meaning and interpret their experiences, interpretive constructivism is particularly applicable. It assists in comprehending how employees and other organizational members interpret and attribute meaning to socially responsible initiatives and strategies within the context of an open strategy.

This research philosophy is consistent with the belief that organizational phenomena are socially and culturally constructed, influenced by the interactions, perceptions, and sensemaking of organizational members, and that meaning emerges from interactions between the researcher and participants (Easterby-Smith et al., 2015). This is relevant to the research question as it highlights the influence of the social context within an organization on the development and implementation of socially responsible strategies. It allows for an exploration of how cultural norms, values, and social interactions shape the perception and acceptance of CSR initiatives.

Interpretive constructivism emphasizes individual subjectivity and personal interpretations of experiences. While it recognizes the importance of social context, it focuses

more on how individuals make sense of their experiences and construct meaning within their unique cognitive frameworks. Moreover, it highlights the individual's active role in constructing knowledge. In the context of open strategy and CSR, it is crucial to understand how individuals within the organization actively participate in the formulation and implementation of socially responsible strategies.

Interpretive constructivism helps in uncovering how personal beliefs, experiences, and cognitive structures influence their contributions and decision-making. It emphasizes how personal beliefs, experiences, and cognitive structures shape the manner in which individuals interpret and understand the world, which might vary even within the same social context and is often applied in broader qualitative research, including organizational studies, anthropology, and sociological research. The research methodology aligned with interpretive constructivism is qualitative and inductive. This approach is well-suited for capturing the richness and complexity of individuals' viewpoints and experiences related to open strategy and CSR. It allows for open-ended data collection techniques such as interviews and observations, which are valuable for exploring the subjective aspects of these practices.

Moreover, it is concerned with understanding how individuals construct meanings and realities within specific contexts and settings. In conclusion, interpretive constructivism provides a suitable lens through which to investigate how open strategy practices contribute to socially responsible corporate strategies. It enables an in-depth exploration of the subjective meaning-making processes of individuals within organizations, shedding light on how they actively shape and interpret these strategies within their unique cognitive frameworks and social contexts. This approach is well-aligned with the research question's emphasis on understanding the human dimension of open strategy and CSR.

3.1.2. Implications for Research Methodology

To be consistent with interpretative constructivism, the research technique must be qualitative and inductive (Easterby-Smith et al., 2015). The following considerations are important in terms of the research technique:

- Qualitative data collecting approaches—like interviews, focus groups, and observations—are best suited for capturing individuals' rich and varied viewpoints within the company. These approaches enable participants to articulate their views and experiences in their own words, thereby enabling the researcher to delve into the complexities of their subjective meaning-making.
- Purposive sampling should be used to select people with relevant knowledge and expertise linked to the study topic. The researcher can gather insights from people with varied viewpoints by selectively selecting participants, generating a more thorough knowledge of organizational phenomena.
- Iterative and inductive data analysis should be used, thereby enabling themes and patterns to emerge from the data rather than imposing predetermined categorization. Techniques like theme analysis, grounded theory, and narrative analysis are useful for exposing subjective interpretations and meaning-making processes in data.
- Because interpretative constructivism is subjective, it is critical for the researcher to participate in reflexivity throughout the research process. Recognizing the researcher's role, biases, and assumptions, as well as how these may impact data collection, analysis, and interpretation.

Adopting the interpretative constructivism research philosophy in business research provides a valuable lens through which to investigate the subjective meaning-making processes within businesses. The study may dig into the varied viewpoints and interpretations of individuals by incorporating qualitative and inductive research approaches, providing useful insights into organizational dynamics and knowledge building. This thesis intends to contribute to a better understanding of how individuals actively generate knowledge and form organizational reality in a business environment by utilizing this approach.

3.2. Research Approach: Theoretical Perspectives

3.2.1. Evolution of Strategic Management Approaches

The field of strategic management is a dynamic field that has changed greatly over the course of time, drawing on the contributions made by a large number of academics and industry professionals. The concept of strategic management may be traced back to the middle of the twentieth century, when scientific and administrative management were the preeminent schools of thought in the field of management philosophy. During this time period, Peter Drucker strongly emphasized, both in his books and writings, on the significance of strategic planning (Drucker, 1954; Drucker, 1965).

Igor Ansoff presented the idea of corporate strategy in the late 1960s. He emphasized the necessity for businesses to diversify their offerings and adjust their operations in response to shifting market conditions (Ansoff, 1965). Michael Porter established himself as a preeminent figure in the field in the 1970s with the publication of his seminal work titled “Competitive Strategy” (Porter, 1980). In his work, Porter introduced the idea of a competitive advantage and

emphasized the significance of conducting an analysis of the structure of an industry and the competitive forces within it.

In the 1980s and 1990s, there was a continuing evolution in strategic management, as revealed by the creation of structured strategic planning procedures as well as the rise of new approaches to strategy. Gary Hamel and C. K. Prahalad first presented the idea of core competencies, highlighting the significance of distinctive organizational capabilities in the context of gaining a competitive advantage (Hamel & Prahalad, 1990). On the basis of this idea, Jay Barney developed the resource-based perspective of the company, which emphasizes the significance of an organization's own resources and skills in establishing a competitive advantage (Barney, 1991).

In the twenty-first century, strategic management has continued to develop alongside the proliferation of digital technology and the increasing significance of environmentally responsible business practices and corporate social responsibility. John Elkington is credited with developing the idea of the “triple bottom line,” which urges businesses to evaluate how their actions affect not just profits but also people and the environment (Elkington, 1997). Michael Porter and Mark Kramer first presented the idea of shared value, which emphasizes the significance of generating economic value while simultaneously catering to the requirements of society (Porter & Kramer, 2011).

Nowadays, strategic management is a multi-disciplinary field that draws on a variety of epistemologies, methodologies, and a variety of other fields, including economics, psychology, sociology, and ecology. While academics and industry professionals continue to investigate the dynamic nature of the business world, fresh insights are continually being added to the huge body of existing literature, which is already rather extensive.

3.2.2. *The Practice Turn in Strategy*

The theory of practice comes from several other disciplines in the world of social sciences and links strategy to wider theoretical and empirical work. Practice theory is trending in other fields of research, such as management, management learning, accounting, marketing, and technology. Practice theory is defined as being more context-sensitive in opposition of the more individualistic view often adopted in strategy research (Vaara & Whittington, 2012).

In opposition to micro-foundations research where the general view is that organizations comprise individuals, practice theory defines organizations as comprising practices that enable individuals; thus, the methodological starting point shifts from beginning from individuals to beginning from practices. Practice theory sheds light on the fact that one's actions are never unrelated to context and that it are the practices in particular which define ones possibilities. (Vaara & Whittington, 2012).

Strategy-as-practice (SAP) literature may be traced back to Richard Whittington's essay entitled "Strategy as Practice" published in *Long-Range Planning* in 1996 (Whittington, 1996). SAP is concerned with "the doing of strategy; who does it, what they do, how they do it, what they use, and what implications this has for shaping strategy" (Jarzabkowski & Spee, 2009, p. 69). According to this view, strategy is not something an organization has but rather something its members do (Jarzabkowski et al., 2007, p. 6). The SAP approach extends existing theoretical perspectives by emphasizing the fine-grained actions and interactions that constitute activity (Jarzabkowski, 2005). It focuses on strategy practices, which are defined as "accepted ways of doing things, embodied and materially mediated, that are shared between actors and routinized over time" (Vaara & Whittington, 2012, p. 278). These practices provide the means for multiple actors to interact and engage in collective action (Jarzabkowski et al., 2007, p. 9).

SAP departs from the traditional view of strategy as the result of decisions made by top management and positions it in the context of continuous interpretation and interaction among organizational practitioners (Kaplan & Orlikowski, 2013). SAP is increasingly concerned with how the organization integrates and influences these plans as they are translated into day-to-day practices that create strategy and change (Balogun et al., 2003, p. 199). SAP recognizes the significance of senior executives and official strategy sessions. In addition, SAP emphasizes the inherent materiality of practices and the function of objects and materials in constituting practices (Kimbell, 2012; Nicolini & Monteiro, 2017). A few studies in the field have gone beyond merely perceiving materiality to comprehend how it permeates all aspects of strategy.

SAP came in to being due to the need to investigate the “black box” of strategy and broaden its scope beyond conventional economic theories (Golsorkhi et al., 2015, p. 3). It portrays strategy as a socially constructed and politically embedded form of human praxis by concentrating on the micro-level activities that constitute strategy as a social practice (Johnson et al., 2003). The discipline distinguishes itself by predominantly relying on sociological theories of practice, focusing on how strategic actors “perform” their roles, and employing novel qualitative methodologies to examine practice more closely (Vaara & Whittington, 2012). SAP enriches strategic management research by emphasizing the impact of organizational practices and activities on decision-making and action, thereby recognizing that strategy is an ongoing, collective process involving interpretation, sensemaking, and improvisation by various organizational actors (Whittington et al., 2011).

The strategy-as-practice perspective introduces a novel approach to strategic management by recognizing both the social and material aspects of practices as well as their effects beyond decision facilitation (Vaara & Whittington, 2012). This perspective provides a more nuanced

understanding of strategy through qualitative studies at different organizational levels, observing micro-moments of praxis and individual performance and influence (Vaara & Whittington, 2012). Non-profit organizations, which are frequently examined in SAP, offer a context-sensitive perspective and consider social and cultural contexts in addition to economic outcomes. The central concept of SAP is that strategy is not solely a cognitive or analytical process but rather a set of social practices intertwined with day-to-day activities, thereby influencing and being influenced by the larger social and cultural context of an organization.

The SAP approach has significant ramifications for both the academic study of strategy and its actual application in the real world. It argues that conventional methods of approaching strategy, which emphasize formal planning and analysis, may not be able to reflect the complexity and dynamism of the process of developing a strategy. Instead, it suggests that a larger focus should be placed on understanding the social and cultural framework in which the process of strategy-making occurs as well as the wide variety of actors and activities that are involved in this process.

In conclusion, the SAP approach provides a helpful means of gaining an understanding of the social practices that are utilized in companies for the purpose of putting strategy into action. It highlights how important it is to view strategy not as a discrete set of decisions or plans but rather as an ongoing collective process of interpretation and improvisation that involves a wide variety of actors and practices within an organization. This is because it allows for more room for creativity and innovation. Although this viewpoint is still in the process of development and there is considerable controversy around its ramifications, it is becoming an increasingly prominent viewpoint in the field of strategic management.

Rooted in the SAP approach, this thesis aims at taking a deeper dive into strategy practitioners (“actors who shape the construction of practice through who they are, how they act, and what resources they draw upon” (Jarzabkowski et al., 2007, p. 8), and contribute to the understanding of strategy as a profession (Whittington et al., 2011). Therefore, this thesis and its research question aim to help “understand human agency in the construction and enactment of strategy and focus the research on the actions and interactions of the strategy practitioners” (Jarzabkowski et al., 2007).

3.3. Case Study Presentation

The case is set in a multinational company (referred to as HomeCo) in the DIY and home improvement market. HomeCo operates on a platform-based approach, enabling all stakeholders to develop their technical and personal skills alongside others in their ecosystem, while remaining agile and responsive. Over 150,000 employees are part of HomeCo, who are brought together by a shared goal and global challenge. Moreover, HomeCo adopts a collaborative approach to development by being a pioneer in participative management through a shared decision-making process that is helping to shape the group’s future. The case specifically focuses on a strategic project that was recently deployed by HomeCo with the objective of co-constructing a new strategic turn for HomeCo by developing and embedding CSR in its corporate strategy and spreading it throughout its BUs through a stakeholder consultation phase, a collaborative strategy formulation phase, and an organization-wide series of sensemaking workshops. Thus, the case study specifically focuses on this project, its process, and the individuals who participated in it.

3.3.1. Access to the Field of Investigation and Ethical Considerations

A) Access to the Field of Investigation.

Before continuing the narrative of this thesis, I would like to indicate how I obtained access to the investigation field that was HomeCo. Before beginning my academic path and joining IÉSEG School of Management as a PhD Candidate and Teaching and Research Assistant, I had worked in the corporate world; more specifically, I had joined HomeCo in 2018 for approximately 10 months. At that time, I was a project manager in the HR department, working more specifically on an international talent development program for the group. Sourcing high potential talents within the company and incubating them for two years within an internal training program. Throughout this program, I had the opportunity to become acquainted with numerous strategic elements and discussions ongoing in the company since the colleagues we integrated in the training program were set on a fast track to appropriate the organization's strategy and be able to develop intrapreneurial projects that sit in line with the strategic objectives. Moreover, it was quite by chance that I was able to attend the International Convention that was organized for the top 800 of HomeCo in fall 2018, because of the program I was coordinating, during which the organization's strategic plan was presented, focusing at that time on how the company can become a platform organization focused on an omnichannel approach. The overall focus of that convention was also to set "safety first" as the primary objective.

While I was working at HomeCo, they were implementing their new leadership model across their different BUs. This leadership model was developed at the headquarters and was being distributed through various appropriation workshops. It is rather important to mention this

model, as it is a guiding element of the corporate culture and values of the company, which has been considered in the future narrative and analysis of the HomeCo case study for this thesis. The leadership model is based on four elements: authenticity, openness, interdependence, and impact.

Naturally, I contacted HomeCo again when I began my PhD journey and discussed with them, in the early days of my second year (2020), the possibilities of working together and seeing how my research project, with a focus on open strategy, could fit in with their agenda. I had heard from former colleagues that not long after I left, many things were beginning to take place at HomeCo; thus, only a couple of months after I left in January 2019 is where the narrative of the case study previously presented begins, which is in March 2019.

B) Ethical Considerations.

This subsection discusses ethical considerations and how the research process was conducted in the most honest and transparent way possible.

In terms of data collection, all the participants were asked for their consent via a consent form ([Appendix 7](#)) prior to recording the interviews. They were explained that verbatims would be used as primary data sources and analyzed subsequently in the process. The transcripts were emailed to all participants as a means of conducting research transparently and, thus, enabling participants to clarify or modify parts of the transcripts; however, none of them returned with any objections. Formal documents explaining the use and conservation of their data were sent to them after conducting interviews, thereby asking them to sign the document and return it by e-mail. These documents are stored with the original audio file and transcripts for each participant.

Each participant was informed that the data collected would be anonymized and would serve the purpose of writing academic articles as the main goal, but that it could also be used in further research resulting in book chapters, media articles, etc. In addition, they were informed that no names would be cited, but that we might refer to the positions and roles they hold within the company. Most of them replied that they had nothing to hide and that they do not mind that their name was used. With regard to sensitive topics, they were also discussed during their recorded interviews, none of them revealed any reluctance to discuss these aspects at that time and neither did they ask me to keep them out of the transcripts.

All participants agreed to those terms and conditions and ethical considerations. The onboarding of those participants was probably facilitated by the fact that I had already worked in the company and that I know the company culture and the way people address each other within it. I was also sponsored by a person who was part of the team in charge of the strategic process design; thus, I was included in the team of the global leader who was leading the strategic transformation as a project manager. I had full access to the company's internal network, with a profile on Workplace and a personal e-mail address. This greatly facilitated the contact points with participants who did not question the fact that they were being interviewed. Most of them did not even ask, although I did point out in the beginning of the interviews that I was not working for the company formally but that we were in a partnership for this project, where both of us would benefit from the work that is being done. Further, I insisted on the fact that the company did not ask me to conduct the interviews, but that I was motivated to take the company as a case study for my research project, as I did not want participants to feel that they were being questioned by the company itself.

Ethical considerations were discussed with the company's upper management and our partnership was regulated by a partnership convention which was signed between my institution and the company itself. This contract regulates both the partner's and my actions within their organization. In addition, it ensures the protection and conservation of data, stipulates the non-financial characteristic of the partnership and the possibility of using the data, collected in the present and the future without the company being able to object to this usage.

I was also appointed a specific contact person within the organization who would help me with anything I required—whether it was accessing information, administrative tasks, or reaching out to the leadership team. The company's communication officer was also included in our exchanges.

Those people who are part of the strategic team and lead the transformation project—including one project manager, one facilitator, and one communication officer—were informed about the progress of the research and were sent the various articles and conference papers resulting from this research; they were also informed through a formal meeting about some of the highlights of the verbatims, which go beyond the scope of my research, but can still be of interest to the company.

3.3.2. Process Overview

The following section is enriched with citations extracted from several interviews to illustrate and enhance the comprehension of the narrative. The choice to leave the extracts as is instead of rewriting the content into the narrative was a deliberate choice, as the rewritten content would not be able to grasp and transcribe the authenticity and viewpoint the interviewee was

making. In order to keep a coherent narrative, the number of citations is limited. In order to provide the reader with a more in-depth understanding and immersion in the case study, several interview extracts have been added to the appendices (Appendix 9). These extracts are key to understanding the context in which the process observed in the organization was developing and also provides an insight into aspects that are not necessarily developed in the various articles of this thesis but that have nonetheless influenced the understanding, sensemaking processes, and interpretations of this thesis.

A) First period: Year 2018 and Earlier—Background and Context.

In the year 2018, several events occurred worldwide: the crisis of “Gilets Jaunes,” whose origin is finally accounted to the idea of an increase in tax due to the implementation of a carbon tax on fuels. This marked the first environmental spark. The second aspect was the media emergence of Greta Thunberg. Third, the first climate protests by students were authorized by the deans of high schools on Friday afternoons in France. Fourth, the resignation of Nicolas Hulot (ex-minister of the ecological transition and solidarity in France). Thus, there was an ambient noise, exogenous to the company on this environmental theme, which was probably felt more than what they may have experienced earlier. In 2018, within the company, there was an international convention in Paris, the theme of which was the platform company and omnichannel business relations shortly after a new CEO was appointed in the corporate parent company. At that convention, various subjects, such as the exceptional relationship, the exceptional offer, the supply chain, or data related projects—that is, subjects that were very much linked to business as usual—were presented. This convention was held for the top 800 of

the company. The next day, a person in charge of environmental subjects in the company sent a message to his managers to point out that environmental subjects were sorely missing in all these presentations that were made during the convention, particularly when thinking about how to project the company in the near future.

Climate change will hit us harder than we think and will change our ways of operating or should change the ways of operating. In any case, we will not be able to do the same thing in the years to come.” [INT43](#).

This synchronicity of events at a given moment created a kind of tipping point. The management replied to this employee by saying that the CEO moved the calendar of the year 2019 around a bit and that they are going to organize something to put themselves on track. However, this starting point cannot only be linked to this employee sending a message to alert the organization about the situation.

In fact, there were already several discussions taking place internally in the year 2018. There was a collective awareness that arose, not quite spontaneously, but more as an alignment of planets that met each other on the same wavelength at the same time, which implies the CEO or even the shareholders. HomeCo, with other organizations from the same family holding (operating in very different sectors), launched the very first working group of an intraorganizational sensemaking process on sustainable business. The idea was to create synergies and share experiences to move faster and in a collective manner; as part of this process, a conference was held with a renowned French climate activist and scientist. This was also a starting point within the personal transformation and awareness development of the CEO of HomeCo. Alongside this, those same companies were already involved in other intraorganizational synergies on various topics as a way of pooling knowledge and skills on a

given subject. The idea is not to reinvent the wheel, but rather to take advantage of this mutualization of certain subjects and make progress together on themes where they are not in competition.

However, those who were the most active precursors on the topics were the employees and this was rather evident during the vision process of one of the major BUs of HomeCo. This business unit has been engaging in vision processes every 10 years for the last 30 years, beginning in 1995. The vision process invites all employees from the BU to participate in a collective ideation process to set the new trends for the BU for the next 10 years. Their last vision process was held in 2015 to set the capstone for 2025, bringing together 22,000 employees and 3,000 residents, suppliers, local councilors, and representatives of public organizations and associations. This gave everyone a voice in 129 discussion sessions, which generated 32,000 ideas ranging from the most imaginative to the most practical. At that point in time many of the ideas that emerged from the vision process were oriented towards transitioning into a more sustainable organization and, of course, the stores and employees did not wait for the new corporate strategy developed in 2019 to begin pushing the boundaries, thereby numerous aspects were already set in motion. Nevertheless, there was an alignment among all these factors that lit the spark that then grew into the process and strategy that was developed. It was emphasized multiple times that the CEO and broader top management also played a key role.

And then there are the managers. I think our CEO is someone who conceptualizes in a very strong, very intelligent way, and who makes a very good link between what his organization is and this kind of high-level concept of sustainable development. So there was this step to take, which is not a natural step at [Business Unit 1]: conceptualization.

And the fact of having taken it, and of feeling that there was a different will behind it, also freed up a lot of energy, a lot of intelligence on this subject. [INT3](#)

B) Second Period: March 2019–July 2019—Pre-Planning and Ideation.

a) March 2019: Kick-Off.

In March 2019, a small group of people from the company met for two days in a hotel in the Paris region. HomeCo launched its strategic process with this two-day event facilitated by the CEO and internal facilitators. For this event, they brought together a diversity of participants, mixing general directors, members of executive committees, a variety of people representing the different jobs of the company, store managers, human resources, and the representative of the shareholders. A small community of 50 people participated, including a few early adopters of these topics and then others who are a little less connected—97% of people were from the headquarters and the remaining were guests. There was Elisabeth Laville from Utopia, who came to oxygenate the audience a little bit, there was one of the mentors of our Chairman of the Supervisory Board, and a few other speakers who came to illustrate what this subject is all about. The objective of this event was for the people who were present to align themselves with the CSR issues of the company and its business model. There was a willingness to develop a pedagogy around the vocabulary used to discuss this subject.

During these two days, the CEO said, “We have never made a real issue of it, we are going to do it now.” The phrase “we’re going to do it now” implies this environmental dimension, which had never been interpreted at the height of what should have been or could have been. There was no regret in the sound of their voices. There was the idea of “okay well

this is probably the time; our business is doing well.” It is also easier to make transformations and movements when the company is doing well. Therefore, they launched themselves into this.

In thinking about how to get moving, the CEO said,

Ok, this is how we are going to make it a real subject and rebalance the tripod. The company is economically viable, humanly developed, environmentally speaking, probably not on the scale of the other two legs of the stool.

The image of the three-legged stool is important as you cannot have a stool that is not balanced. Thus, there is this dimension of contribution to the world that appears—to begin a form of contributive enterprise by leaning toward the UN’s SDGs. The idea is not to reinvent a separate subject but to be part of a century of action and to be in a form of additionality of contributions to the world, to companies, and to governments.

At the end of these two days, a very small group of people (five to six) were to meet again afterwards. Even though there will be different circles subsequently, basically there is this small circle in which they are aligned on the fact that they need to listen to their stakeholders, and on their willingness to co-construct an inclusive process around the subject of CSR.

The CEO had posed the concept of utility two or three years earlier. HomeCo is a company useful to itself, to others, and to the world. In his explanation, “useful to oneself” is rather clear, and “useful to others” is somewhat in line with the company’s mission. Usefulness to the world is undoubtedly something that is slightly impalpable and indescribable. Each person may have his or her own definition of it, and so this is the question they are going to ask thousands of stakeholders worldwide, both internally (employees) and externally. To achieve this they asked general directors and store managers to nominate two to three employees. They were

at liberty to nominate who they believed was fit and relevant, and to whom they are going to ask, “can you talk to your offer manager, with the trade unionist, with ...?” Thus, these employees went out to ask that same unique question to this external network of stakeholders.

And that's a very classic approach, isn't it? There's nothing new in that. The only thing is, we didn't get an audit firm to do the surveys, we got our employees to take up the subject and go out into their own network to see what a supplier says, what a grandmother customer says, and what a student says, and that's how we came up with this data collection. And so all this material gave us a broad, international spectrum, so it wasn't just Franco-French and not from an auditing firm. So, the value of this feedback lies in the fact that it really came from the field in a highly decentralized manner. At the same time, we collected all this information for a much more formal analysis. And then, everything that happened afterwards could not be questioned, because, in fact, it was the people who had said it, and we had numbers. [INT45](#)

After one week, they overachieved their objective and collected over 4500 verbatim from their stakeholders at an international level. They collected approximately 8,000 different verbatims in total, which they put into a semantic analysis engine. The output of this analysis is a sort of word map, representing the most salient words that were most frequently repeated, which outlined the main subjects on which the stakeholders had expectations regarding the company, with words such as health, security, diversity, biodiversity, climate change, waste, pollution, transport, etc. There were 10 main subjects identified, among which 4 clearly stood out: (1) waste management, (2) raw materials, (3) the environment, and (4) employment. A steering committee was created to create a strategic plan from this broad consultation.

Simultaneously, the company was undertaking a global mapping of all their CSR initiatives within their BUs, asking their CSR leaders in each business unit to list and compile them in a file, comprising approximately 300 lines on Excel. This reveals that there is already a fertile ground for these topics, even though at this point in time, they make no distinctions between the environmental dimension and the human-social dimension. From this questioning on the global scale of their stakeholders and this mapping, they have initiated a bottom-up process. It is really the questioning of their stakeholders, which makes the raw material, that they are going to work on for almost a year, in proximity with the CEO. Approximately 10 people were part of the steering committee (one headquarter corporate social responsibility leader, one business unit corporate social responsibility leader, one business unit HR leader, one business unit general manager, two internal experts (social and environmental), one spokesperson representing those who attended the kick-off and who was elected that day, one leader on product issues, one external consultant, and one internal facilitator) and were selected because they represent various perspectives of the company. Moreover, they all attended the kick-off meeting. The objective was to identify how to organize all the ideas that were collected previously and to ascertain what the implications and consequences were of each idea.

They punctually included in the circle experts from the product, service, and quality teams, in specific countries, to verify that what they developed works, that it is coherent and makes sense, that it is understandable and that there is adhesion. For a year, they set a sentence, a percentage, a commitment date etc. ..., adjusting slowly the new strategic direction of the company with all the different teams and people involved. The idea really was to build the structure with those who know, more than those who have the power.



I'd say that anyone can contribute to the writing of a strategy, but that the process of doing so must be hyper-procedural, and that requires a different skill set. There's a design process to strategy creation because it can't be improvised. You can't just put 30 people in a room and say, "Come up with a strategy." Because we've tested it in a small committee at some point, without any method, it's just counter discussion where we can't agree and so we have fourteen proposals and we come back to them because at some point we don't process that. So there's a need for that. There's still a need for this process. On the other hand, anyone can contribute. [INT45](#)

This small team probably did not have all the skills. It was plural, and it had the capacity to connect to the entire world. Within this team, two people with high convictions were pushing for change in the social and the environmental dimensions. Perhaps they did not have everything, they certainly did not know everything, but they had all the possible connections to get the expertise where needed.

So, once again, I don't know if collaboration to the extreme, with everyone participating, is good? Is it almost not, or even a little counterproductive? I think that today, for the sake of efficiency and relevance, we should perhaps ask contributors to say why they are positioning themselves? To almost do a bit of recruiting. [INT17](#)

For example, for waste management—which is one of the words on the map, a topic of a commitment they were developing—they connected with a person from one of their BUs in France, who is undoubtedly one of the best experts on this topic, with someone else in Italy, who has a good grasp of the subject of waste in a different business unit. They worked like this on all the topics, with a lot of back and forth, and a lot of expertise. The small team dived in deep,

wrote things that were perhaps badly written, brutal, not in the right dosage, and then confronted a lot of these subjects with those who know best to refine them.

I saw the birth of a strategy, the questions it raises and the triggers it generates. And so, at a certain point, I was lucky enough, really lucky enough, to have contributed to this and therefore to have a really large format. I've grown in power, skills, and knowledge by working with this approach. [INT45](#)

b) July 2019: Presentation of the Strategic Plan.

In July 2019, the steering committee presented its recommendations and the strategic plan to the executive board comprising the CEO and his eight close leadership team members. It was seeming impossible for the board to make a decision. However, paradoxically, there was an individual acceptance in one's own domain that the suggestions made sense. It was rather on how they would form a global strategy that was still difficult to form a consensus on. From this, the steering committee reworked on several pledges to prepare a second version.

C) Third Period: August 2019–March 2020—Strategy Formulation.

a) August 2019: Annual Meeting of the General Directors and Store Managers.

In August 2019, the annual meeting of the general directors and store managers was held. At this point in time, the CEO decided that the general directors and the store managers needed to appropriate the process that was set in motion. This was a turning point in the process, without which the entire process would not have been what it is today. The CEO wanted to show and

convince the audience that their companies and stores had a role to play in answering climate change and CSR subjects. During this event, it was also the opportunity for several CSR leaders in the company to speak more freely and express with an emotional background what they really felt as well as to put into perspective, once again, the purpose of the company, its usefulness, and the reality of what it does as well as to raise awareness that growth is destroying nature, which provides us with what are termed ecosystem services, which are necessary for life. In any case it was time to deliver a reading that was not commonly heard at that time. They were invited to speak in front of the audience, and they talked with their heart and their own convictions on the subject—not on their experience as a CSR leader but through their own personal experience. From this moment on, the steering committee had free reins to continue to work on the strategic plan.

b) September–December 2019: Closed Room Work.

There was a final review after this. The CEO first, followed by his close leadership team; however, the strategic plan was also presented to the parent company's leadership team, with around 30 leaders of the organization. The primary intention of the small working group was always to deliver the content of the commitments being formulated, which represent a new strategy for HomeCo. Then, it is not the strategy of only the CSR team, but it becomes the strategy of the company. It becomes the new backbone of the group's businesses. Only three to four people (one facilitator, one HR leader, two experts (social and environmental)) continued to work on the formulation of a strategic plan during this time, and in early December, the working group found the binding element, which would make everything more embedded and avoid

presenting something that is off ground; there was a need for it to take root. They presented their work for the first time to the shareholders. The presentation ended with a standing ovation and great comments and feedback on what was presented.

c) January 2020–March 2020: Willingness to Organize a Convention.

The original intention was to hold a convention in March 2020, at which time they planned to hold an international convention to deliver the newly formulated strategy, inviting over 700 people from the company and the wider ecosystem, to present the strategic plan. The conditions throughout the world with the COVID-19 pandemic implied numerous changes because of lockdowns and travel restrictions, which I will not detail here as what happened at that time is common knowledge. However, the working group did not understand at that time that they would not be able to organize the event a couple of weeks later and were subsequently confronted with the economic reality of stores closing. Thus, the context was not appropriate anymore to organize such a big event, and they changed their means of delivering the message.

The COVID-19 context implied that they had to revisit how they were going to do it. At that time, they felt they were ready, that it was time, and that they could not put off delivering the content. Instead of impacting the top 700, which was initially planned, they aimed to impact the 130,000 employees at that time. They felt they had to act now, otherwise the enthusiasm and dynamics around the project would fade away. Thus, they decided to reuse material that had already been shot previously and take the opportunity to make a movie/documentary out of it to pitch their new strategic plan. This is how they, ultimately, reduced the process into a certain number of tools—with a workshop that the small working group designed or rather which the

internal facilitator would codesign with the communications department—to translate the intention into something that could be appropriated by the finest mesh and, therefore, by each of the employees. This was set to be immediately translated in all the languages used by the group, in order to avoid using only English or a bad translation; thus, it will be disseminated in Brazilian, Russian, Chinese, etc.

D) Fourth Period: March 2020–December 2021—Planning and Deployment of the Strategic Plan and Beginning of the Implementation Phase.

a) May 2020: Developing the Documentary and Workshop.

In May 2020, the documentary turned out to be more of a pedagogical documentary, explaining the future strategy of the organization and was created to be easily understood by all employees, town mayors, students, and other stakeholders. They set the point on the fact that the content should not be a strategist-to-strategist content. With an emphasis on testimonials from real life experiences, facts, and proof of what the organization already accomplished, the documentary “USEFUL” was conceived as an illustrated documentary (words, videos, and important figures). It also lays out the obstacles they must overcome and the promises they must make to one another in order to identify answers and implement effective, all-encompassing measures that take into account economic, human, and environmental factors. Moreover, the documentary set out to promote on-field experience of what was going on in the various BUs. It also featured the diversity of the various BUs, which represented different countries and brands, and ensured gender parity. The objective was that people understand and appropriate the new strategy. The working group put in place several guidelines to ensure that the message was spread throughout

the company: (1) the documentary had to be screened during collective meetings; (2) it had to be seen during working hours; (3) a communication kit was provided to those organizing the viewing, which had to be thoroughly respected but could be adapted to local context; (4) feedback about the viewing had to be collected and submitted through a Google form in order to identify which subjects were the most engaging.

The documentary presented 24 pledges formulated from 8000 verbatims. Among these pledges, 12 were mandatory (gender equality, listening to employees, and carbon statement) and 12 were contributory pledges (pedagogy around consuming more responsibly). The workshops were developed around three steps: (1) inspiration, (2) appropriation, and (3) commitment.

After settling on making a documentary, the question of how to distribute it became critical. The workshop concept developed from within the framework of the five concepts described above. Inspiration, appropriation, and commitment served as the pillars upon which the sessions were built. For all three of these actions, the term “together” is crucial. The purpose of the workshop was to assist people in deciding what they will dedicate themselves to in terms of their brand, their company, and their specific division. Over 70,000 employees attended the 3-hour workshop by September 2020, and over 110,000 by June 2021.

The workshop was broken down into several steps, with a time of inclusion at the beginning, the projection of the documentary, a time for gathering each one’s feelings, and then an appropriation game, with cards. The card game was based on the logic of the Climate Fresk (a card game designed to explain the causes and effects of climate change in a three-hour interactive workshop). The addition of the card game to the workshop was prompted by the realization that the documentary alone would not suffice. There was a need to make people enjoy themselves, thereby allowing them to be swept away by the images and music and let their

imaginations run wild, while there was also a need to concretize and imprint the ideas being presented. The cards outlined why the organization is committing, how it is committing, and the reminder of what the pledge is. In addition, they indicated landmarks so that the cards could be rearranged on the game board in the right category.

In fact, I think the cards have given us a concrete way of measuring our positive impact. Because when you talk about a positive impact, you can very well say yeah, I'm good, I'm not good, and at the time we couldn't measure that. [INT26](#)

All of this, again, was conducted in all languages and either online through video conferencing tools or face-to-face because of the COVID-19 context. The principle of the workshop with the cards is to re-articulate, re-manipulate, and regain awareness by re-reading the cards, re-drawing the HomeCo house, and ultimately to re-challenge themselves twice, by saying “and as an individual, what are the commitments that make you feel alive? In the collective in which you find yourself, what are the objectives for which you want to move forward and commit yourself?” Then, they take a final picture of the group and have a debriefing by the workshop facilitator. This is how the workshop was designed.

The workshop was rather informative and helped bring together a diverse group of individuals. The aim was to tell them to continue writing the story and choose the topics that make the most sense wherever they are to activate, execute, and multiply them. The supplied plan offers a basic framework, except for the pledges’ distinctiveness, which is more of a requirement for all BUs. Each employee was given the tools they required to take this action throughout this procedure and session.

When I took up my positive impact job three years ago, I was completely taken aback by the number of employees saying, “I'd like to work on CSR, I'd like to have a mission that makes sense, I'd like to have a coffee with you to talk about it, I'd like to work on a mission that makes sense and CSR.” I've had a lot of people come to me with that in mind, so I thought, what are we going to do with this? Because it's not my vocation to have a team of 150 people, it's now my vocation for the 25,000 employees of Business Unit France to pivot in their roles, to pivot in their way of being useful and doing their job, and so it's up to each person in their job to do their job differently to improve their social and environmental impact where they are. [INT2](#)

b) July 2020—September 2020: First Screening of the Documentary by the Executive Committee and Appropriation Workshop Deployment.

In July 2020, the executive committee that had completely refused the first proposal in July 2019, was the first to see the documentary and welcomed it very enthusiastically. Thereafter, “impulse circles” were created. Throughout the building process, the piloting committee worked with a number of individuals and planned to rely on a few of these relationships as well as the network of CSR executives in their BUs. They identified “master connectors” (general ambassadors). The idea behind the impulse circles is that at least one person in each business unit takes on the role of “master connector” to implement the workshop. There were 30 master connectors, and they were selected by the general managers of each BU after they saw the documentary for the first time. The choice of master connectors was guided toward people who have a certain sensitivity to the subject. These people were given the keys to the workshop

toolkit and were told to take 100% of the employees along this journey: “It's your turn, with all the tools that we've presented to you, etc., which are very easy to use, to identify and coordinate. Now organize the distribution of this, within a timeframe that we'll set between September and June.” The working group developed a communication kit to accompany those facilitating the workshop. These master connectors will then identify in their BUs several connectors, who will find themselves invested with a somewhat privileged role, of transmitter, spokesperson, transmitter of the company's strategy. What would have been in a classic case, and was before, the role of the CEOs and the top 1000, the heads of the departments and so on. This time it is different, it is a connector, sometimes a store manager, or a particularly inspired employee that takes on this role. In one business unit, the approach was to make a call in each store, to get one or two people per store, to create a community of connectors; as a result, individuals emerged from concealment. Some who had an inclination for these subjects, who may or may not have already expressed it, and that is how, in the end, a community of several hundred volunteer employees was created, who participated in the dissemination, production and transmission of these workshops.

The working group developed a communication kit to accompany those facilitating the workshop and translated the documentary and workshop materials in 12 different languages for the appropriation to be the highest possible. The visioning of the documentary is done either 100% digitally or 100% face-to-face depending on the possibilities due to the sanitary restrictions. Some BUs and connectors have decided to take the time and do it in their own way. By September 2020, 70,000 employees had followed the 3-hour sessions and the numbers reached 110,000 in June 2021. The official deployment period ended in December 2021.

The context during which this process has been developed and launched was peculiar (COVID-19) and has certainly helped in stirring up the interest and excitement around the process and accentuated the commitment and investment of participants, as individual consciences were raised regarding sanitary conditions and environmental and social issues. The deployment of the documentary continued until the end of 2021.

The particularity of this process that needs to be emphasized is that initially, the entire process should have ended at the international convention in March 2020, in front of the top 800 of the group. Of course, there would certainly have been some material afterwards, which would have come down throughout the various BUs and its leaders, managers, etc. However, each one would have reimagined in his BU, or store, how to share it with the employees. If we go back to the international convention of 2018, there is no real evidence of how the inputs that were given were redistributed and reshared among all employees. This really imposes the time to think about the delivery mode. The approach has been rather singular, which makes it an interesting object of study.

Thanks to COVID for blowing it all up. Without it, we'd never have ... well, we'd have a nice strategy, nice slides that would have stayed in our bosses' offices... Obviously. [INT45](#)

In a time, common to all the employees, which was spread over a few months, they shared the same information—whether they were a BU CEO, a store manager, or a hardware sales advisor at a store in Brazil—without any distinction of status. Over 8800 workshops have been held throughout the various BUs. This creates a form of impregnation, of awareness, the beginning of a common action process. People could not say anymore that they did not know. It puts everyone on the same starting line, at about the same time.

Daily, it is not because you have seen the best movie or shared an ultra-powerful conference in which you were struck by the information that was given, that you change your behavior overnight. [INT43](#)

This process and workshop gave the keys to each of the employees to be able to act in this sense. Then the company went back to a global animation scheme, in a somewhat unusual context of COVID-19, with absentees, people who are there, and priorities that are given to the day-to-day topics of selling products. Therefore, they were not necessarily in a framework of implementation that was perhaps as fluid as that in a so-called normal situation. Today, actions are initiated at numerous levels. The process connected numerous people and shared a lot of information.

Short implementation dates were instituted on purpose to translate the notion of urgency and to emphasize the dimension of climate emergency. The steering committee found that they could not talk about climate emergencies, or environmental emergencies, by giving themselves five- or ten-year deadlines. For many of the pledges that were presented the set deadline was almost already surpassed. However, the idea is that it is up to each one of the employees to take ownership and to say, “Ok, I’ll decline this, and this, and this.” This was also the intention of the question at the end of the workshop when the participants were asked what they wanted to put in motion. They had the entire possibility to go their own way and to go faster. The pledges presented have a form of expansion, but they were already quite precise. The framework was well drawn, but it was alright to step outside of the framework if the perimeter of the framework had already been explored. Overall, whether it be during the ideation phase, the formulation phase, or the implementation phase, everyone had the opportunity at some point to express

themselves and put forward their ideas. At any time, if anyone wanted to express themselves or propose something, they were allowed to do so.

The aim of these sequences was also to get the teams involved, to generate ideas and build a team committed to the store's CSR projects. And it's still in place. Well, it's moved around a bit, because people have either left or wanted to refresh the existing team, so they've been given carte blanche to steer the various CSR pledges at store level. [INT17](#)

There are obviously people who have taken the bait, certainly stronger than others, and who will not conceive of their job any other way now than by integrating these elements, because they have been given the opportunity to do so, to express it. For others, there is a form of stasis, between “I felt liberated” and “business as usual.” The conviction of one does not lead to the conversion of all. However, the company does not change its course. The intention is that the strategy must not become an expert subject. Instead, it was to make it a subject that everyone could use.

After that, I think that today you sometimes have to go looking for information, but all channels are open. I can't say we don't have access. In our line of work, do we always have the time, or does each of us have the time, or does each of us take the time to deal with all subjects in the same way, that is another story? [INT25](#)

The objective then was to measure the impact of the process. The framework has been set and now that the general directors embed the strategy within their BUs, it is no longer something that has been dropped on them by corporate. There is a positive spiral that has been created by the appropriation phase, and there is this “I can do it” reaction, people are ready, and it is on every individual’s conscience. The type of business (habitat) also helps a lot, as it is different

from the oil industry, which by definition can never be sustainable. The communication process will be reinforced, at that time both for internal and external communication. The positive impact pledges team (created during the process, with the appointment of a global leader of positive impact) is in charge of following up on the KPIs. Each business unit now works on the strategies locally and actions are locally adapted and deployed.

E) Fifth Period: December 2021–October 2022: Ongoing Implementation Phase.

a) December 2021: End of the Appropriation Workshop Deployment and Development of the Implementation Support Platform.

In order to put the strategic plan into action, the first step was to raise awareness and the second step was to take action. Both the documentary and the workshop did an excellent job of raising people's awareness on the issue and motivating them to implement the strategy. However, the question of how to motivate employees to behave appropriately remained unanswered, in particular, in the domain of CSR, where it is easy to squander a great deal of time on ineffectual activities.

During this time period, the diverse BUs continued to incorporate the corporate strategy into their own strategic plans. In order to support the implementation phase, one of the business divisions collaborated with an external startup to develop a digital portal for taking necessary actions. The only type of activity that will ever be incorporated into the platform, which is organized around five pillars of commitment, is the organization's positive impact strategy. On the platform, 90 activities have been referenced as of the present day. These actions have been selected based on what was being done in the field and which actions have been successful or on

what was deemed a priority by business referents at the national level, who then developed operational procedures. However, staff also have the ability to propose additional actions that can be added on the platform, and 170 suggestions have already been made. These suggestions are then validated by the business referent if the action makes sense at a national level; the referent then works on the action card in partnership with the person from the store that has the field knowledge to implement it. Each action card follows the same template—there is a photo, the meaning of the action (why it is a positive impact action), which of the five commitments it is part of, and what type of action it is (essential: 100 points; secondary: 20 points; optional: 5 points). The card also includes information regarding the implementation steps (budget, time, space, etc.), the stores that have already implemented it, and a link to the contact person who is the business referent on that particular action (questions and answers are also displayed on the action card page to create a section on frequently asked questions). Eight months after the launch of the platform, 3,500 actions had already completed and recorded.

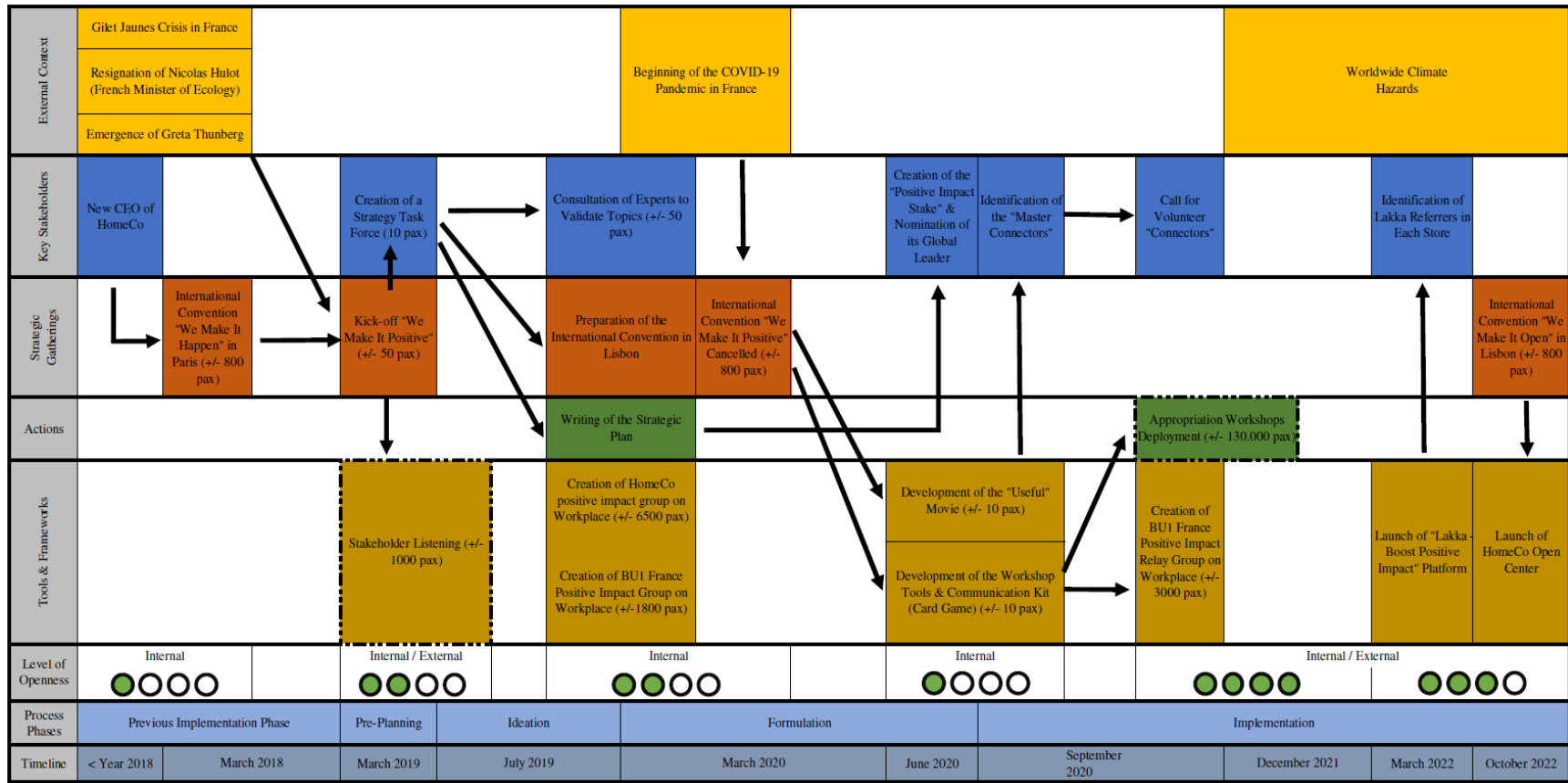
So that's what we've been missing, that's what I find much more pedagogical today in terms of follow-up, the tools we have at our disposal to support ... Just LAKAA. It's brilliant. I think that LAKAA has enabled us to energize our stores in a very educational and fun way. It wasn't about competition, but about saying "Wow, there are lots of things to do". And the points are just symbolic, but it's about saying, here's the gauge, it's going up because I'm putting things in place. And maybe, if you turn it around, "I was already doing a lot of things and didn't realize it." [INT17](#)

b) October 2022: New International Convention in Lisbon.

A year after the introduction of the implementation phase, it was time to assess how the new strategy had been implemented. Thus, in Lisbon, a new International Convention was organized, called “We Make it Open”. The purpose of this convention was to establish a forum for stakeholders to construct a global platform for a sustainable habitat. During this event, the CEO also reaffirmed his vision for the organization and presented what he envisioned as future pillars of the organization. This convention was also marked by the introduction of the HomeCo open center, which enables all employees to access information regarding the company’s strategy in a completely open and transparent manner and can also be accessed by individuals who are external to the company in a more restricted version.

The overall process is represented in Figure 3, depicting the various time periods and activities that were ongoing at that time and how many people were involved. The level of openness is represented as an indicator of how open the process was, based on the interpretation of the data collected and the interviewee's input. The arrows indicate the causal links among elements.

Figure 3
Process Overview



3.4. Research Strategy

In this section, the general methodological approach is developed. The pertinence of a longitudinal single case study is brought forward, and the various data collection (semi-directed interviews, observations, and secondary data) and analysis methods (grounded theory approach) are elaborated upon.

3.4.1. General Methodological Approach

While longitudinal case studies provide a comprehensive understanding of temporal dynamics, the single case study approach is specifically tailored to in-depth analysis and aligns with a constructivist epistemological perspective. In the following section, we delve into the rationale behind opting for the single case study approach and its relevance to our research question.

A) A Comprehensive Understanding of Organizational Dynamics Through Longitudinal Case Studies.

Longitudinal case studies are a significant tool in business research that enables researchers to obtain a thorough picture of organizational dynamics through time. This method entails an in-depth assessment of a single case or a few organizations over time, collecting data at various periods to capture changes, trends, and developments within a business. Longitudinal case studies are very useful when researching complicated and developing phenomena in real-world business contexts. Longitudinal case studies, as opposed to cross-sectional studies, track

the case(s) across time, thereby offering insights into processes, causal linkages, and developmental trajectories (Yin, 2017).

This temporal dimension is essential for understanding organizational evolution and adaptation to internal and external influences. Researchers use a number of data collection methods, including interviews, observations, documents, and archival materials to collect information on the case(s) under investigation. This extensive data collection enables a thorough examination of organizational intricacies. Longitudinal case studies emphasize contextual awareness, acknowledging that organizational phenomena are affected by the specific setting and culture of the case. To comprehend the complexities of the context, researchers dive deep into the organizational environment.

Longitudinal case studies provide researchers with a rich and in-depth understanding of organizational processes, allowing them to investigate the “how” and “why” of changes and advancements. They provide practical insights into real-world companies that may be used to influence business processes and decision-making. Researchers can discover causal links and investigate how specific events or actions affect organizational results across time. Finally, they allow for the discovery of patterns, trends, and cycles within an organization, thereby enabling a better knowledge of how it operates.

Because of the lengthy data collecting and analysis periods, longitudinal case studies require a large commitment of time and resources. Managing vast amounts of longitudinal data may be difficult, thereby necessitating meticulous organization and documentation. Given their focus on individual situations, longitudinal case studies may have limited generalizability to other contexts.

B) Single Case Study Approach.

An increasing number of studies have been using case studies to understand organizations' strategies in practice. A recent article, in line with Whittington (1996), also brings forward that case studies are a "suitable method to perform an in-depth analysis of phenomena when it concerns the perspective of strategy as practice, once it looks at the case in its singularity and so does the strategy as a social practice process." (Bellucci & Lavarda, 2018, p.1). Moreover, Flyvbjerg (2006, p. 242), brings forward that "a scientific discipline without a large number of thoroughly executed case studies is a discipline without systematic production of exemplars, and a discipline without exemplars is an ineffective one." Thus, this thesis builds itself around a single case study approach, which is in line with the understanding and definition of Stake (1995) and Merriam (1998).

Indeed, we find ourselves to be closer to their constructivist epistemological positioning rather than Yin's (2018) more positivistic positioning. According to Stake (1995), the researcher taking on a case study as his research methodology is an interpreter and collector of interpretations, which require the reporting of interpretations of reality or of the knowledge constructed and collected throughout investigation. Moreover, "there are multiple perspectives and visions of the case, which need to be represented, but there is no means to establish the best approach." (Stake, 1995, p. 108). In her approach to a case study, Merriam (1998) brings forward that there are multiple interpretations of reality, and that qualitative research is based on the vision that individuals interacting with their social world construct as their reality. Thus, the main interest of qualitative studies would be to understand the interpretation, or the knowledge constructed by individuals. Thus, the final product of a case study is a new interpretation of the vision of others, filtered through the vision of the researcher. Merriam (1998, p. 27) considers

“the case study as a thing, a singular entity, a unit around which boundaries are set,” which offers a larger realm of possibilities for what is considered a case study. As long as the researcher can set boundaries around the research object, we can call it a case study. She describes a case study as being “a description and an intense and holistic analysis of a phenomenon defined as a program, an institution, a person, a process, or a social unit (Merriam, 1998, p. xiii). The case study is particularistic (axed on a particular situation, an event, a program, or phenomenon), descriptive (produces a rich and dense description of the studied phenomenon), and heuristic (it illuminates the reader’s comprehension regarding the phenomenon studied).

When it comes to the design of our case study, we take on Merriam’s perspective as well, who combines the rigor imposed by Yin (2018) and the required flexibility claimed by Stake (1995). In her approach, she recommends building the design by conducting a literature review, to build the theoretical framework, to identify a research problem that will refine a research question, and finally to select a sample (deliberate sampling). The deliberate sampling takes place before collecting the data and the theoretical sampling takes place during the data collection (Merriam, 1998, p.66). Thus, in order to ensure the necessary rigor regarding the design of the case study before the data collection, Yin’s (2018) approach is built upon in order to build a clear roadmap. The flexibility of Stake (1995) is also accepted, which allows the design to evolve, even after the data collection process has begun by following his viewpoint that not everything can be mapped out upfront. Thus, the debate turns around the three elements of theory, reliability, and validity for which the case study method is often criticized (Flyvbjerg, 2006). Against this critical view of case studies, Flyvbjerg (2006) describes and corrects the following five misunderstandings in his paper on case study research: (1) theoretical knowledge is more valuable than practical knowledge; (2) one cannot generalize from a single case and,

therefore, the single-case study cannot contribute to scientific development; (3) a case study is most useful for generating hypotheses, whereas other methods are more suitable for hypotheses testing and theory building; (4) a case study is biased toward verification; and (5) it is often difficult to summarize specific case studies.

Thus, in line with Flyvbjerg's (2006) arguments, we find that our single descriptive case study approach is most appropriate to explore our research question. This type of case study is used to describe an intervention or phenomenon and the real-life context in which it occurs (Yin, 2018). Case studies are particularly well suited to answer "how" and "why" questions and are useful to generate and build theory in a field where there is little data or theory available (Yin, 2018).

3.4.2. Data Collection

The following sections focus on the data collection and analysis for Articles 2 and 3 that base themselves on the case study previously presented. Article 1 adopts another methodology and methods of data collection and analysis, which is presented more extensively in Chapter 4.

Data was collected from different sources, combining real-time and retrospective data collection processes (Pettigrew, 1990) to ensure veracity and dependability of the collected data. All three authors cited previously (Merriam, 1998; Stake, 1995; Yin, 2014) are aligned on this aspect and bring forward data triangulation through a comparison of the various data sources in order to refine and reinforce the interpretations. However, a difference remains with Yin's (2018) approach to collecting data, as he brings forward the use of both qualitative and quantitative methods to collect data, whereas Merriam (1998) and Stake (1995) suggest the use

of qualitative methods only. Aligned with their perspective, a sole qualitative approach was adopted through various methods and types of collected data ([Table 3](#)). To ensure the veracity and dependability of the data collected, it was collected from various sources and combined with real-time and retrospective data collection (Pettigrew, 1990), including as archives, corporate websites, social media, internal company reports, participant observation, the collection of workshop artefacts such as PowerPoints, a card game, and a documentary. However, the main data source came from a series of semi-directed interviews conducted with leaders and employees from the organization involved in the process. By combining divergent pieces of information, a more complete picture of the situation was created and triangulation became feasible. Data was collected over the course of approximately two years (May 2021—January 2023), thereby generating a complete set of processual data (Langley, 1999). The purpose of the data collection was to examine the entire strategizing process, which comprised the ideation, formulation, and execution phases of a strategic plan.

Table 3*Data Collected: Source, Type, and Length (Thesis Overview)*

Data source	Description	Type	Amount/Length
Semi-structured interviews	These interviews were conducted within various business units of the company and consist of people in the organizing team, those who actively participated in the crafting and facilitation of the appropriation workshops, and middle managers and lower levels employees who have facilitated and/or participated in a workshop and/or actively implemented the strategy in their day-to day actions.	Audio recordings, written transcripts, and written notes	50 interviews >33.5 hours (Min: 14 minutes; Max: 84 minutes)
Documents	“Connector kits” (PowerPoints, notes, and guidebooks (word document) to facilitate a workshop), PowerPoints presenting the card game and PowerPoints presenting the strategy	Written documents, PowerPoint presentations, and meeting minutes	13 items
Observations	Observation of appropriation workshops. Participated in two workshops and observed how the workshops were held and organized as well as what material elements were used.	Pictures and written notes	6 hours
Artifacts	The documentary, card game, connector’s kit, and the implementation platform	Word documents, PowerPoints, screenshots/pictures, and videos	5 items
Secondary data	Documentation of workshops through third-party collected pictures and surveys, informal discussions that took place with participants outside of formally programmed interviews, screenshots of websites dedicated to the presentation of the strategy, and screenshots of internal social media posts	Survey results, screenshots/pictures, written notes	91 items

A) Semi-Directed Interviews.

Conducting in-depth interviews with organizational members enables researchers to explore their subjective interpretations, experiences, and viewpoints. Through open-ended questions, researchers can uncover the meanings attached to organizational events and behaviors.

Most interviews were conducted on Zoom as with the COVID-19 pandemic, most employees were and are still working remotely. However, when possible and relevant, interviews were held face-to-face. Nevertheless, as the objective was to have an overview of how the project was deployed throughout the organization and required access to employees from around France, for obvious reasons of time, budget, and geographical access (Gray et al., 2020), this would have been the approach even in a non-pandemic context. Researchers have warned against several challenges encountered in conducting online data collection (Howlett, 2021), although, we do find that the pandemic has accelerated and democratized the use of visio-conferencing, which in turn eased our experience of conducting our interviews through Zoom and other digital tools, as people are generally more acquainted to them now. Online and digital research is also not new, researchers have been using online surveys, interviews over the phone and Skype or social media to conduct research earlier (Archibald et al., 2019; Gray et al., 2020). To a certain extent, researchers found that conducting interviews through online tools also presents a set of advantages over conducting interviews in a face-to-face setting. The conversations for example were more private when not conducted at the workplace and, thus, interviewees were easy (in terms of environment, clothing, and schedule) and open in their discussions, which also resulted in interviews lasting longer than they would in the traditional setting; moreover, they were more conversational, more detailed, and less formal than in face-to-face settings (Howlett, 2021). Finally, non-verbal cues remain accessible through videoconferencing tools and, thus, offer an

evenly authentic interaction with the interviewee as in a face-to-face setting (Archibald et al., 2019; Sullivan, 2013); this ensured that quality did not differ.

Fifty interviews were conducted ([Appendix 6](#)) for a total of 33 hours and 30 minutes, with the longest interview lasting for 1 hour and 24 minutes and the shortest one being 14 minutes. These interviews were conducted in various BUs of HomeCo and consist of people in the organizing team, those who actively participated in the crafting and facilitation of the appropriation workshops and middle managers and lower levels employees who have participated in a workshop and/or actively implement the strategy in their day-to day actions.

B) Observations.

Observational techniques and fieldwork provide opportunities to observe organizational interactions and behaviors in real-time. Immersing oneself in the organizational setting enables researchers to understand the social dynamics and the construction of meaning in situ.

During the process, it was decided that all employees of the company would participate in an appropriation workshop. These workshops are detailed in the case description; they were held either online or in face-to-face settings and aimed at explaining and collectively constructing an engagement within the guidelines of the new strategy. I took part in two of those workshops and observed how the workshops were held, organized, and what material elements were used.

C) Secondary Data.

Examining organizational documents—such as reports, memos, and emails—provides additional insights into the communication patterns and sensemaking processes within the organization.

Throughout the time in the field, secondary data, such as the documentary that was made specifically for and used during the process is also part of the material analyzed. Moreover, corporate communication statements regarding the process on social media and on internal social and communication platforms was collected. Finally, we collected elements such as PowerPoint presentations used during the process, meeting minutes, and Google drive where all written and visual elements related to the process are saved ([Table 3](#)).

3.4.3. Data Analysis

A) Grounded Theory.

Because of its capacity to accept multiple data sources, flexibility in developing theory, and conformity with the constructivist epistemology guiding this research, the grounded theory was selected as the preferable technique of data analysis for the longitudinal single case study in this thesis dissertation. This research uses grounded theory to add to the corpus of knowledge in the field by offering a theory that arises directly from the data and is securely founded in the participants' experiences and views. Through this methodological choice, the research seeks to

deepen understanding of the phenomenon under investigation and advance constructivist research principles.

Grounded theory is a qualitative research method created in the 1960s by Glaser and Strauss (Glaser & Strauss, 1967). It is particularly well-suited for investigating complicated social processes and developing ideas based on facts. Rather than imposing pre-existing ideas on the research, grounded theory seeks to identify patterns, categories, and concepts that emerge directly from the data. Moreover, grounded theory enables researchers to obtain an in-depth understanding of the researched phenomena by enabling hypotheses to arise naturally from the data, thereby making it well-suited for exploratory and explanatory research.

The longitudinal single case study design used in this work aims to analyze a specific occurrence in its natural setting over a long period of time. Such a design requires an analytical method capable of fully capturing the complexity and dynamism of the phenomena under consideration. Given the research's goal of investigating an area with few prior theoretical frameworks, grounded theory was selected to give the flexibility and sensitivity necessary for inductive theory-building (Charmaz, 2014).

Multiple data collection methods—including interviews, observations, and artifact analysis—provide a large and diverse dataset. The flexibility of grounded theory to accommodate multiple types of evidence and uncover links between them provides a solid analytical technique to unraveling the complexities of the phenomena researched. Grounded theory provides for an in-depth investigation of the data's rich contextual subtleties through a systematic and iterative data analysis procedure, thereby providing a thorough comprehension of the subject matter (Glaser, 2001).

The epistemological perspective of this study is consistent with constructivism, which holds that knowledge is actively built by humans based on their subjective experiences, interpretations, and interactions with the environment. Researchers recognize the co-construction of knowledge between participants and themselves within a constructivist epistemological framework. The purpose is to comprehend the views of the participants as well as the interpretations they place on their experiences (Crotty, 1998).

Grounded theory lends itself particularly well to a constructivist epistemology because it encourages researchers to immerse themselves in the data and interpret it in the context of the participants' actual experiences. Researchers can realize their involvement in molding the study and be open to different interpretations and understandings that arise from the data by adopting a reflexive approach (Charmaz, 2014).

The iterative data analysis method in grounded theory enables researchers to actively engage with the data, make frequent comparisons, and enhance their knowledge of the phenomena under issue. This continual interaction with the data helps the researchers to elicit the participants' subjective viewpoints and build a theory that is consistent with their experiences (Strauss & Corbin, 1998).

B) Data Analysis Explained for Each Article.

NVIVO was used for coding the data and analyzing it in iterative cycles throughout data collection in order to adjust data collection if required (Stake, 1995). The analysis of data is “a process through which the researcher gives sense to data. And giving sense to data calls upon consolidation, reduction and interpretation of what individuals have said and of what the

researcher has seen and read—it is the process of making sense” (Merriam, 1998, p.178). With regard to data validation, once again we must part from Yin’s (2018) approach that rests on data validity and reliability by implementing various methods in order to guarantee these two aspects throughout all steps of the research. However, within a constructivist approach of a case study, “qualitative studies offer the reader a detailed representation in order to show that the conclusions of the researcher make sense” (Merriam, 1998, p.199). In addition, triangulation of sources, researchers, theories, and methodologies enables the researcher to “gain the confirmation needed in order to increase the credibility of the interpretation and to show the resemblance of its assertion” (Stake, 1995).

In the below section, a more in-depth view of the data analysis process for each article is provided—that is, illustrating how the codes were constructed for each article and how various sources of data were used to construct the analysis presented in each article.

a) Article 1.

A qualitative meta-synthesis (QMS) was conducted in Article 1. The QMS helps scholars systematically review primary qualitative research, thereby allowing concepts to be linked across studies with the purpose of integrating findings and, from this, to generate meaning, make sense, identify higher-order organizational phenomena, and/or build further theory (Point et al., 2017, p. 187). The final database for the QMS ([Appendix 1](#)) includes 25 journal articles.

Appendix 2 presents the evidence of how the first-order codes in Article 1 were constructed from the various case studies analyzed. For each code, it is shown in how many cases the code was found in and how many references support the code (all articles confounded). To illustrate each code, elements of representative data have been selected and are juxtaposed in the table with reference to the case study the data originates from.

b) Article 2. Exploring First-Order Codes and Second-Order Themes.

Article 2 aims to explore the complex aspects of participant inclusion and transparency in order to identify practical strategies that organizations can utilize to address the inherent challenges associated with open strategy. Additionally, the study seeks to determine if there are alternative options available beyond participation and inclusion (Mack & Szulanski, 2017). The first-order codes and second-order themes ([Figure 4](#)) that emerged from the analysis of the data are presented in more detail in Appendix 3.

Figure 4

Coding Levels—Article 2¹

¹ A larger version of this figure is available in Chapter 5 under the label [The data](#) analysis was guided by the previously developed theoretical constructs in order to determine the sense of belonging and authenticity of the participants in open strategy processes. NVIVO was used for coding the data and analyzing it in iterative cycles throughout the data collection to adjust the data collection if needed (Stake, 1995). The data analysis was built around various steps. First, the various documents and artefacts that were used during the process were chronologically classified to start reconstructing the process. From this, and through the preliminary interviews that were conducted, it was possible to reconstitute the timeline of HomeCo's strategic process (Figure 9) and the various elements that were part of the overall process, setting them within their chronological order (Langley, 1999), namely: (1) stakeholder listening, (2) strategy formulation through various workshops, (3) organization of the deployment strategy, (4) training connectors and producing the strategy toolkit, (5) facilitating the appropriation workshops and (6) implementing the strategy. The processes for developing strategies over the long term may employ a variety of practices or even repeat the same practices several times (in this case, for example, the international conventions). Although 'strategic planning' can be thought of as a practice, different kinds of events can compose a process within the practice (e.g., stakeholder listening, strategy writing and appropriation workshops) (Kouamé & Langley, 2018).

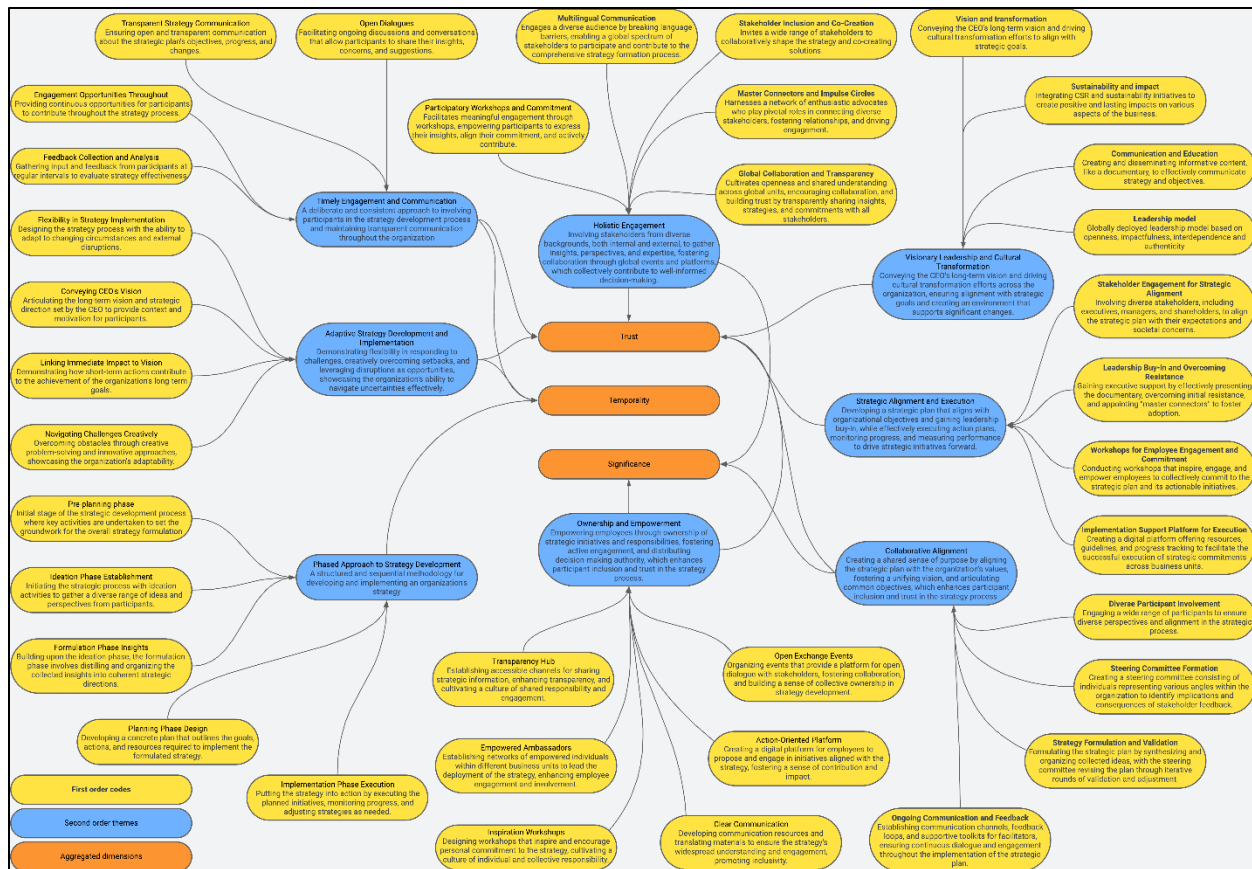
Following the “outcome-driven narrative” method (Kouamé & Langley, 2018, p. 569), this study aimed to explain how a certain outcome (in this case, participant inclusion in the process) evolved by relying on the evidence and sources of explanation at the micro-level using retrospective data and interviews. This study investigated distinct practices across successive periods and evaluated how they instantiate emergent outcomes through time by integrating progression (“showing progressive and/or mutual influence between micro and macro over time”) and instantiation (“showing how microprocesses accomplish macro outcomes”) (Kouamé & Langley, 2018, p. 565), expanding theorization of the micro-macro relationship in strategy-as-practice research. This research is intriguing, as it demonstrates how the strategic plan originates as a result of multiple ‘zones of inclusion’ across many time periods and how it is then re-contextualized and changed after its initial formulation.

The interviews were open-coded to condense the information necessary for making sense of the interview transcript and to better understand what practices were used during this process and how they led to participant inclusion within an open strategy approach. Working through the

data, the newly created codes were classified into numerous categories (first-order codes) and recurring themes, such as open dialogues, empowered ambassadors, diverse participant involvement and vision and transformation (

Figure ***Error! Not a valid bookmark self-reference.***). Following several readings and the coding of the data, the first-order codes were turned into second-order themes, thereby yielding a better theoretical understanding of the data and building up to the themes of holistic engagement, ownership and empowerment or timely engagement and communication. As a last stage in the process of building a grounded understanding of the issue, the analysis indicated that trust, significance, and temporality (aggregated dimensions) are three aspects that support inclusion in open strategy processes.

Figure 8 (p. 174).



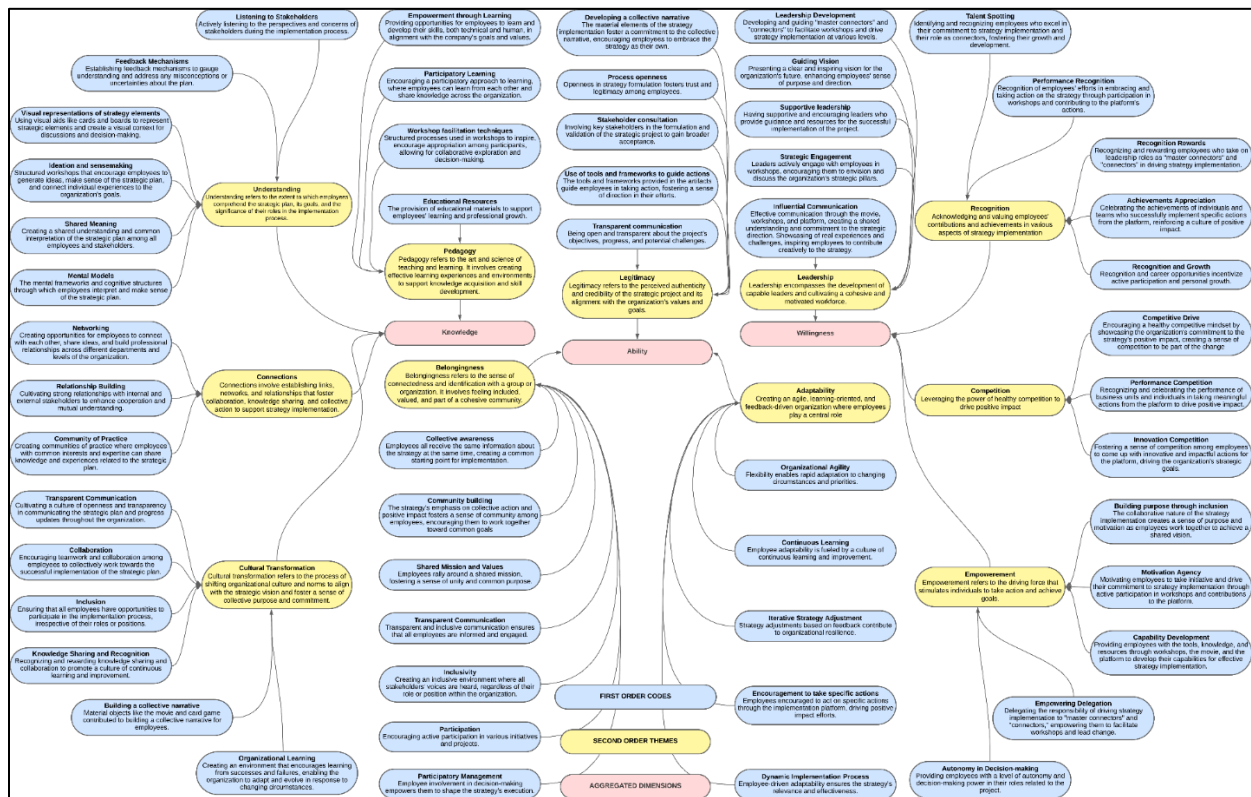
c) Article 3. Exploring First-Order Codes and Second-Order Themes.

To understand first-order codes, second-order themes, and their relationship, we can think of first-order codes as specific, concrete, and granular data elements, while second-order themes are broader, more abstract, and conceptual patterns that emerge from the analysis of these first-order codes (Easterby-Smith et al., 2015). The first-order codes and second-order themes presented in [Figure 5](#) and detailed in Appendix 4, demonstrate how materiality, embodied in the various artefacts (documentary, workshop, cards game, implementation platform), plays a critical role in fostering employee commitment to the strategy implementation process. The artefacts contribute to knowledge creation and transmission, help employees appropriate the strategy, and empower them to take action. They also serve as tools to guide the implementation process and

build a sense of belongingness and community within the organization. It is evident that the organization's approach to strategy implementation, which involves material artefacts and participative methods, has been instrumental in generating interest and commitment among employees, especially in a unique context like the COVID-19 pandemic. The shared understanding and sense of ownership fostered through the material elements contribute to employees' willingness to act and align their actions with the organization's strategic objectives.

Figure 5

Coding Levels—Article 3²



²² A larger version of this figure is available in Chapter 6 under the label Figure 10 (p. 222).

Chapter 4. Complexity, Stakeholder Engagement, and Open Strategy

The following section presents the first standalone article developed in this thesis. It is a theoretical article that adopts the approach of qualitative meta-synthesis (QMS). QMS helps scholars systematically review primary qualitative research, allowing concepts to be linked across studies with the purpose of integrating findings and, from this, to generate meaning, make sense, detect higher-order organizational phenomena, and/or build further theory (Point et al., 2017, p. 187). It thus serves as groundwork for exploring the open strategy phenomenon and its literature. Table 4 provides a summary of the research process.

Table 4

Summary of the Research Process—Article 1

Stage	Actions and details of analysis (Eight steps given by Hoon (2013))
Framing and data collection	Framing the <u>Research question</u> : How can organizations manage the complexity of stakeholder engagement and openness in their strategy-making processes? <u>Research objectives</u> : What are the complexities encountered during open strategy processes? What can organizations do to manage complexity in open strategy processes?
Identifying relevant research	<ul style="list-style-type: none"> • Search of articles across 4 databases: Emerald, Web of science, Business source complete, Science direct (N=87 after removing duplicates). Article AND “open strategy” in TITLE OR “strateg* open*” in TITLE OR “open* strateg*” in TITLE Articles published between 2007 (first time “open strategy” was used) and 2022 <ul style="list-style-type: none"> • Including articles from Long Range Planning’s Special issue in 2017 on open strategy (N = 90 after excluding duplicates) • Conducting a search by authors names in Web of Science (N = 98 after excluding duplicates) “Open strategy” in ALL FIELDS AND Author All authors from LRP special issue + authors identified from previous searches having first authored at least 2 articles or written a literature review on open strategy (detail in Table 5) <ul style="list-style-type: none"> • Forward & backward searches in Web of science or Google Scholar if not available in Web of science (N = 1124 after

Stage	Actions and details of analysis (Eight steps given by Hoon (2013))	
Inclusion criteria for the QMS		<p>excluding duplicates)</p> <p>All articles from LRP special issue + articles from authors identified from previous searches having first authored at least 2 articles or written a literature review on open strategy (detail in Table 5) + founding articles of open strategy (Chesbrough & Appleyard, 2007)</p> <ul style="list-style-type: none"> • Peer reviewed articles ranked three or higher in the Academic Journal Guide the year of their publication (N = 576) • Removing false positives based on title (N = 148) • Removing false positives after reading abstracts (N = 74) • Articles using a single or multiple case study methodology (N = 21).
Data analysis	<p>Extracting and coding data</p> <p>Analyzing on a case-specific level</p> <p>Synthesizing at a cross-study level</p>	<p>Grounded theory approach—Inductive open coding throughout the 21 case studies</p> <p>43 emerging codes, 1729 references coded</p> <p>First-order codes:</p> <ul style="list-style-type: none"> • Inclusion (quantity) vs. Inclusion (engagement) • Process control and power balance • Process and practice flexibility • Needs and capabilities of participants • Flow of people in the process • Collaborative work dynamics • Communication flows and information accessibility • Dialogue and transparency • Monitoring/regulation of the process practices • Participants considered relevant • Factors impacting openness • Reasons to engage in open strategy processes <p>From the cross-case analysis, five second-order codes were defined:</p> <ul style="list-style-type: none"> • Developing process guidance • Encouraging procedural openness • Organizing group dynamics • Building legitimacy and buy-in • Facilitating accessibility
Meta-synthesis	<p>Building theory from meta-synthesis</p> <p>Discussion and conclusion</p>	<p>Three categories emerging from the data analysis: Structure in openness, neutrality in openness, and purpose in openness.</p> <p>conclusion that organizations lack skills and resources in collaborative processes and work group management.</p> <p>Introducing facilitation and the role of the facilitator to manage complexity in stakeholder engagement and open strategy processes. Suggesting that future research can focus on ways to provide more structure, neutrality, and purpose in open organizing, potentially through facilitation, boundary spanners, or collaborative governance.</p>

Managing Complexity in Stakeholder Engagement and Open Strategy Processes Through Facilitation: A Qualitative Meta-synthesis.

4.1. Abstract

With more openness, more practices, and more stakeholders involved, open organizing has become more complex to manage. This article explores open strategy and its closely related concept of stakeholder engagement by further exploring the dynamics of openness in open strategy initiatives through a qualitative meta-synthesis of 25 peer-reviewed journal articles. First, the theory on open strategy is consolidated by developing a reading of open strategy processes and what complexities arise from them. Second, open strategy constructs are extended by exploring more deeply how organizations can manage the complexities, thereby bringing forward five constructs (Encouraging procedural openness, organizing group dynamics, developing process guidance, facilitating accessibility, and building legitimacy and buy-in). Finally, the notions of structure, neutrality, and purpose are proposed as an answer to why organizations struggle with openness and, thus, extend theorization on open strategy whilst bridging these findings with stakeholder engagement literature. Further, the role of facilitators and facilitation is discussed as being a means to manage the identified complexities.

Keywords: Open strategy, stakeholder engagement, facilitation, qualitative meta-synthesis

4.2. Article 1: Managing Complexity in Stakeholder Engagement and Open Strategy Processes Through Facilitation: A Qualitative Meta-Synthesis.

4.2.1. Introduction

Open strategy is a recent research topic within the field of strategic management, which has gained thrust amongst academics over the last decade. Even though the two main constructs of open strategy, inclusion and transparency (Hautz et al., 2017; Whittington et al., 2011), have been previously present in the debates of strategic management literature, the societal, cultural and organizational changes in today's world mark a step towards more openness (Seidl et al., 2019b).

As the literature is still nascent, numerous factors influencing the level of openness in open strategy initiatives are being discussed, brought to light, and refined. Debates have arisen regarding the levels of participation (Mack & Szulanski, 2017), the nature of people participating (crowds and communities) (Dobusch & Kapeller, 2018), the processes of decision-making (Hautz et al., 2017; Whittington et al., 2011), and even the role of information systems (Morton et al., 2017). Although many benefits such as the possibilities of collective intelligence (Bjelland & Wood, 2008), positive impression management (Gegenhuber & Dobusch, 2017), increased legitimacy and brand loyalty (Luedicke et al., 2017; Stieger et al., 2012) and interorganizational sense-making (Seidl & Werle, 2018; Van der Steen, 2017) have been associated with opening the strategy making process, the literature focuses a lot on the problems that arise with the inclusion of a wider set of participants, such as the dilemma of process, commitment, disclosure,

empowerment, and escalation (Hautz et al., 2017) and whether these participants have the skills to participate in strategy-making.

In response, this article aims at further exploring the dynamics of openness in open strategy initiatives and poses the following research question: How can organizations manage the complexity of openness in their strategy-making processes? Therefore, this paper develops a qualitative meta-synthesis (QMS) of 25 peer-reviewed journal articles. A meta-synthesis has the ability to build theory through the consolidation of primary studies and can thus help in either extending, refining or generating theory (Hoon, 2013, p. 527), focusing as much on the “what,” “how,” and “why.” QMS is appropriate for studying an individual or a process, which motivates its use for the analysis of open strategy processes and its stakeholders. Rooted in the strategy-as-practice approach, this article aims at taking a deeper dive into strategy practitioners (“actors who shape the construction of practice through who they are, how they act and what resources they draw upon” (Jarzabkowski et al., 2007, p. 8), thereby contributing to the understanding of strategy as a profession (Whittington et al., 2011).

The article will first offer an overview of the methods used for the QMS, how relevant literature was identified and selected and how the data was coded, extracted, and used. This paper first consolidates theory on open strategy by coding and analyzing 25 case studies with existing constructs of the literature, developing a consolidated reading of open strategy processes and the complexities that arise from them. Second, open strategy constructs are extended by exploring more deeply how organizations can manage the complexities, bringing forward five constructs (Encouraging procedural openness, organizing group dynamics, developing process guidance, facilitating accessibility, and building legitimacy and buy-in). Then, the notions of structure, neutrality, and purpose are presented in a model and are discussed as being an answer

to why organizations struggle with openness and, thus, extending theorization on open strategy and bridging these findings with stakeholder engagement literature. This model allows to move beyond the traditional elements of inclusion and transparency and suggests structure, purpose, and neutrality to be considered instead in crafting, guiding, and analyzing open strategy. The article brings forward the role of facilitators and facilitation in open strategy initiatives and stakeholder engagement as means to manage the identified complexities. Finally, as a conclusion, this article suggests future research paths.

4.2.2. Theoretical Background

Chesbrough and Appleyard (2007) used the term “open strategy” for the first time in their paper linking open innovation to strategy and is now commonly defined through the notions of inclusion and transparency (Whittington et al., 2011, p. 532). Inclusion in open strategy is mainly defined as “the participation in an organization’s ‘strategic conversation’, the exchanges of information, views and proposals intended to shape the continued evolution of an organization’s strategy” (Whittington et al., 2011, p. 536). Thus, the intention is to consult a wider range of people traditionally excluded from the ‘strategic conversation’ and to go beyond the boundaries of the organization to widen the pool of people involved. It also implies an increase in transparency, as in the “visibility of information about an organization’s strategy, potentially during the formulation process but particularly with regard to the strategy finally produced” (Whittington et al., 2011, p. 536).

In open strategy, both constructs (inclusion and transparency) could extend beyond the boundaries of the organization such as is the case with open innovation (Chesbrough & Appleyard, 2007) and are in contrast with traditional strategy making, which is seen as an

exclusive practice of top management in organizations (Barney, 1991; Birkinshaw, 2017; Chandler, 1962). open strategy is not a binary phenomenon but rather a continuum, where open strategy processes can be more or less open in both inclusion and transparency (Whittington et al., 2011). However, this definition brings a level of confusion, as the terms participation and inclusion are being used interchangeably within the open strategy literature (Mack & Szulanski, 2017). Mack and Szulanski (2017) suggest that organizations can manage the tensions arising from greater openness in the process of strategy-making by differentiating and managing the level of engagement of stakeholders in participatory and inclusive practices. Here, “participation is about increasing stakeholders’ input for decisions (information-gathering activities), and inclusion is about creating and sustaining a community of interacting stakeholders engaged in an ongoing stream of issues in the strategy process (work groups or task forces, with information-sharing, interactions, and joint decision-making)” (Mack & Szulanski, 2017, p. 386; Quick & Feldman, 2011).

It was found that in most cases, open strategy has a high degree of openness regarding the factual dimension (“the range of different topics that can be discussed”) and the temporal dimension (“the capability to integrate different purposes”), allowing a great variety of topics and purposes within the strategy-making initiatives (Dobusch et al., 2017, p. 9). However, open strategy lacks openness in the social dimension (“the variety of the different groups of people whose contributions will be treated as meaningful” (Dobusch et al., 2017, p. 9), as a majority of cases show that the strategy-making initiative is open only to internal practitioners, which is in contrast to the aspiring characteristic of inclusion defined by Whittington et al. (2011). Moreover, these dimensions of openness have been found to have a relation of interdependence (Dobusch et al., 2017); in other words, when one factor increases toward a higher level of

openness, it is expected that the other two factors evolve respectively, unless they are explicitly limited to a lower degree of openness.

Regarding this aspect, we examine how content-related openness and processual openness are used in a two-dimensional framework of openness by examining three defining elements of openness: (1) Access to sensitive information, (2) modes of participation, and (3) modes of decision-making (Dobusch et al. 2019, p. 364). Processual openness is about setting the rules and procedures upfront to avoid individuals to make changes during the process. However, closure in open processes is unavoidable; to enable certain forms of openness, complementary forms of closure are required (Dobusch et al., 2019, p. 345). When moving through openness and closure, several dilemmas emerge, such as the dilemma of process, commitment, disclosure, empowerment, and escalation (Hautz et al., 2017), which often result in exclusionary practices to lower the levels of openness and lower the tensions arising from these dilemmas. In numerous cases in the literature of open strategy, the accent has been set on “including” the highest number of people within the process (Bjelland & Wood, 2008; Denyer et al., 2011; Heracleous et al., 2018; Seidl & Werle, 2018), without much regard to how these people would interact together. As these open strategy initiatives emerge, even with the sincere commitment and will of opening strategic processes, there comes an end to the process itself and its openness, although little is said in open strategy about the ongoing nature of openness.

4.2.3. Methodological Approach

To examine the research question, this paper adopts the approach of a meta-study. A meta-study can help to clarify contentious issues, resolve arguments and debates, and identify

unexplored emergent properties and dimensions of organizational forms (Point et al., 2017, p. 187). In this study, the method of qualitative meta-synthesis is employed. In contrast to the more common meta-analysis used to review literature from a quantitative perspective, QMS helps scholars systematically review primary qualitative research, allowing concepts to be linked across studies with the purpose of integrating findings and, from this, to generate meaning, make sense, detect higher-order organizational phenomena, and/or build further theory (Point et al., 2017, p. 187). A QMS, where the database of the study consists of the findings of a sum of qualitative studies, provides a third-level interpretation aimed at pushing forward knowledge or theory on the given object of study, rather than combining studies such as meta-analyses do (Nye et al., 2016). Here, synthesis implies extracting and analyzing insights from primary studies to identify categories and patterns, while preserving the integrity of original studies (Hoon, 2013). The aim is to forge something more complete through the synthesis than what the individual parts bring forward on their own (Suri, 2011).

Originating in healthcare studies (Sandelowski et al., 1997), qualitative meta-syntheses have recently been developing in social sciences and more specifically in management science through studies published in journals such as *Leadership Quarterly* (Athanasopoulou & Dopson, 2018), *Organizational Research Methods* (Hoon, 2013), *Long-Range Planning* (Karhu & Ritala, 2021), *Human Resource Management Review* (Soral et al., 2021), *Ecological Economics* (Carlson & Palmer, 2016), *Government Information Quarterly* (Lee, 2010), and *International Business Review* (Metsola et al., 2020). Similar to most of the articles cited previously, this paper's methodology is inspired by the eight steps to conduct a QMS, described by Hoon (2013) in her paper on dynamic capabilities in management science.

A) Identifying Relevant Literature.

To identify relevant literature for the QMS, four databases were used: Web of Science, EBSCO (business source complete), Science direct and Emerald. The search criteria were set to journal articles only within the period 2007–2022, as it was in 2007 that Chesbrough and Appleyard (2007) used the term “open strategy” for the first time to describe the phenomenon. The following search string was used: Article AND “open strategy” in TITLE OR “strateg* open*” in TITLE OR “open* strateg*” in TITLE.

The search yielded 87 references, which qualified according to the criteria after eliminating duplicates. A special issue on open strategy was published in 2017 in Long-Range Planning. All articles from that special issue were added to the sample. This allowed our sample to increase to 90 references after eliminating duplicates. These first rounds allowed to identify which authors have significantly contributed to the open strategy literature and a search was conducted in Web of Science, using the author’s name and the search string: “open strategy” ALL FIELDS AND Author. All authors from the Long-Range Planning special issue and authors identified from previous searches having first authored at least 2 articles or written a literature review on open strategy were used for this search round. This led to the addition of eight references, bringing our sample to 98 references. From there, we conducted a forward and backward integration, including papers matching our search string criteria previously mentioned, taking the papers from our previously identified authors as our search basis. This led to the addition of 1027 references to the database after removing duplicates, raising the total sample to 1125 references. Further, the research question and the combined research string applied here, ensured data saturation was reached quite early on, in the logic of purposeful sampling (Suri,

2011). The aim of the research process and the sampling is to be as close as possible to the open strategy context as defined in the recent literature.

B) Selecting Relevant Literature for the QMS.

It is suggested that the quality of the primary data in a synthesis is of central importance (Hoon 2013). Therefore, the Academic Journal Guide rating was used as a criterion for inclusion in our final sample and for defining quality; excluding journal articles that were rated 2 and below in their year of publishing, this reduced our sample to 577 references. Then, references were checked for false positives based on title, thereby reducing the sample to 148 references. A false positive check was then conducted after reading the abstracts of the remaining papers, bringing the sample down to 56 references. Finally, a methodological exclusion factor was applied, as it is recommended to select studies using the same methodological approach to allow for higher comparability and final validity of the meta-synthesis (Hoon, 2013). As the primary data for the meta-synthesis comprise the findings of previous studies, this paper, such as Hoon's (2013) paper, will be based only on articles using a single or multiple case-study methodology, which offers context-sensitive data, as these articles are rich bodies of empirical data. The selection of information-dense examples for more in-depth research is at the heart of both the rationale and the power of deliberate sampling. Cases that are information-rich are ones from which one may learn a great deal about topics that are of primary relevance to the objective of the investigation (Suri, 2011). This reduced the number of references to 25 journal articles, thereby constituting the final database for the QMS ([Appendix 1](#)). The table hereunder ([Table 5](#)) presents the distribution of the selected journal articles across the years of publication and the journals that published them.

Table 5*Distribution of Articles Reviewed*

Years	Journal (number of articles reviewed)	Articles
2003–2005	Journal of Management Studies (1)	Hjortsø (2004); Regnér (2003)
	European Journal of Operational Research (1)	
2006–2010	MIT Sloan Management Review (1)	Bjelland & Wood (2008); Harrison et al. (2010); Jarzabkowski & Balogun (2009); Schmitt (2010)
	Journal of Management Studies (1)	
	Industrial Marketing Management (1)	
	Journal of Business Ethics (1)	
2011–2015	Journal of the Operational Research Society (1)	Bryant et al. (2011); Denyer et al. (2011); Franken & Thomsett (2013); Stieger et al. (2012)
	Ecological Economics (1)	
	California Management Review (2)	
2016–2020	Journal of Management Studies (1)	(Amrollahi & Rowlands, 2017, 2018; Castelló et al., 2016; Deken et al., 2018; Dobusch et al., 2019; Dobusch & Kapeller, 2018; Gegenhuber & Dobusch, 2017; Luedicke et al., 2017; Morton et al., 2020; Seidl & Werle, 2018; Van der Steen, 2017; Zaggl et al., 2019)
	Information Technology & People (1)	
	Long-Range Planning (4)	
	Information & Management (1)	
	Academy of Management Journal (1)	
	Strategic Management Journal (1)	
	Organization Studies (1)	
	IEEE Transactions on Engineering Management (1)	
The Journal of Strategic Information Systems (1)		
2021–2022	Organization Studies (1)	(Diriker et al., 2023; Plotnikova et al., 2021; Splitter et al., 2021)
	Long-Range Planning (1)	
	Journal of Management Studies (1)	

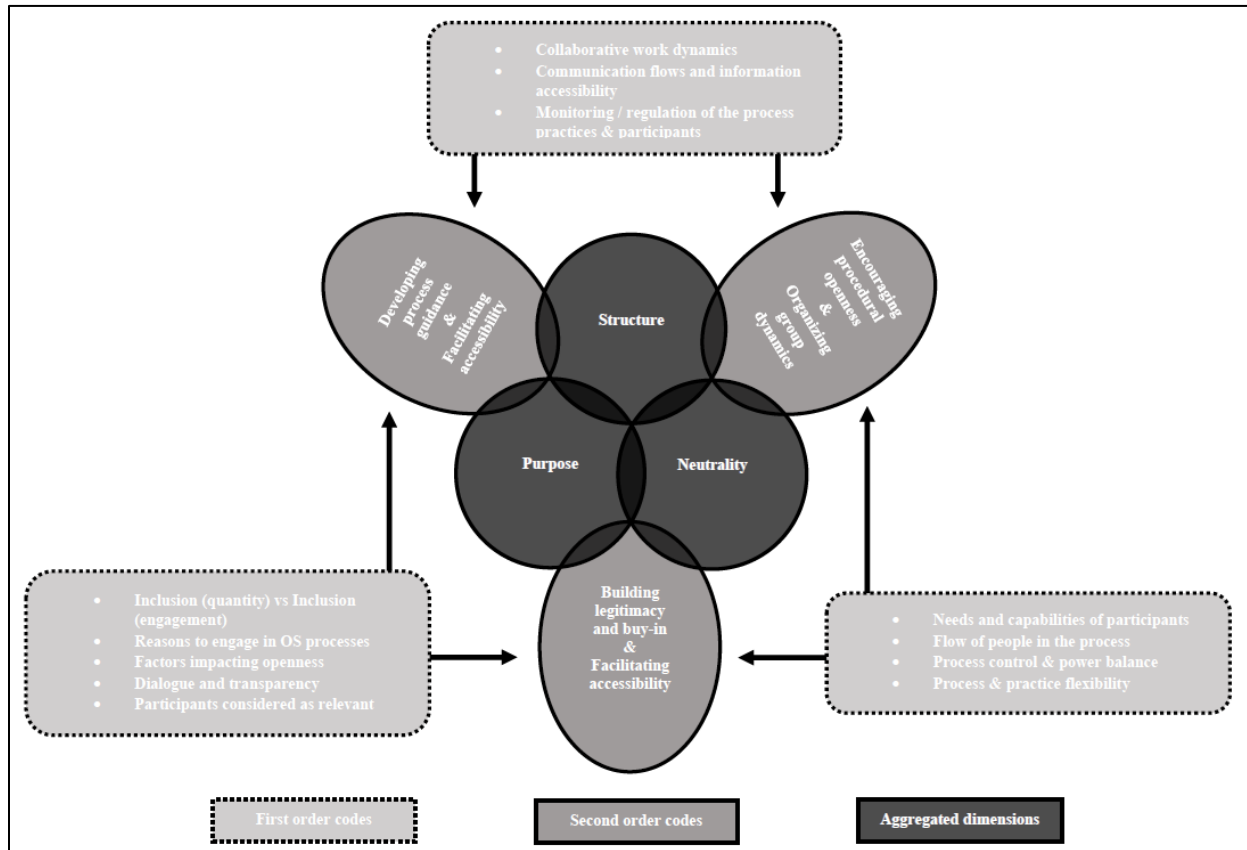
C) Data Analysis Process.

Grounded theory (Corbin & Strauss, 1990; Strauss & Corbin, 1998) enables the development of new concepts and theories that are grounded in qualitative data. As a QMS is based on an exploratory approach, the data set comprises data from previous studies with their own agenda and is selected based on their relevance to the overarching research subject (open strategy). This methodological approach was used to analyze the selected case studies in this paper, as fellow researchers have done in similar papers that employ a QMS approach (Carlson & Palmer, 2016; Soral et al., 2021).

As a first step in the coding process, open coding was performed to understand what the complexities of openness and stakeholder engagement are in open strategy processes. NVIVO was used to organize the 43 codes that emerged from the studies. As the coding process went on, these emerging codes were organized into categories (first order codes) and patterns were identified. For example, “Information input from organizations” and “Loss of context and argumentation” were categorized as “Communication flows and information accessibility.” These first-order codes, represent what complexities exist within open strategy processes. Thus, this primary understanding was “grounded” and confirmed with each additional case analyzed (Corbin & Strauss, 1990, p. 10–11), and to attain data sufficiency, which is one of the two logics behind data sampling for either primary research, and for research synthesis (Suri, 2011). The coding process and levels are presented in [Figure 6](#).

Figure 6.

Coding Process and Levels—Article 1



a) Cross-case.

After several readings and coding of the data, the first-order codes moved into second order themes, adding a more theoretical interpretation of the data. These second order themes emerged from a close comparison with extant literature and the data at hand, which helped in framing the second order themes as the practices through which organizations can manage the complexity of openness in open strategy processes and underlines why these practices are fundamental. The second-order themes all build up toward the three constructs posed as being fundamental to open strategy—participation, inclusion, and decision-making. For example, first-

order codes “Communication flows and information accessibility” and “Process control & power balance” were categorized under the second-order theme “Encouraging procedural openness”. Throughout the analysis of the different case studies five second order themes emerged from the data and readings which are (1) developing process guidance, (2) facilitating accessibility of content, (3) building legitimacy and buy-in, (4) encouraging procedural openness and (5) organizing group dynamics. These five themes, although referring to very distinctive actions, needs and practices, are very much interrelated and support one another. The next section dives deeper into how the various case studies illustrate these different elements.

b) Developing Process Guidance.

Throughout the different cases it was rather evident that both participants and organizations were encountering several problems related to *collaborative work dynamics*. The most revealing element was the difficulty of reaching a consensus. In several cases, it is evident that the participants could not really find a common aim for their work group, which led to the breaking down of the process (Seidl & Werle, 2018; Van der Steen, 2017). It is rather evident that all the participants do not have the same aims and motivations and are then again not always aligned with those of the organization (Dobusch & Kapeller, 2018). To be able to progress, discussions must end, and the agreed upon elements should not be up for debate anymore after a certain period of time. With the numerous differing views and ideas arising from the participants, there is a need to guide and build toward a consensus through a structured and informed process (Bryant et al., 2011). In certain cases, a moderator was appointed to guide the participants and converge ideas together (Bjelland & Wood, 2008). The fear of participating is also an element that is recurring throughout the different cases analyzed; where participants had the fear that top

management was tracing their ideas, looking at who said what (Amrollahi & Rowlands, 2018; Stieger et al., 2012; Van der Steen, 2017). This fear translates a lack of trust, which entails lower or no participation in the process (Denyer et al., 2011).

From the analysis, it is evident that in many cases the *communication flows and information accessibility* were lacking. Overall, organizations were not raising sufficient awareness about the initiative among the different participants (Amrollahi & Rowlands, 2017; Stieger et al., 2012). Participants are often lost concerning what is expected from them and why they are involved in the process (J. Bryant et al., 2011; Dobusch et al., 2019; Stieger et al., 2012). They need guidance before, during and after the process of open strategy making. Guidance can come in several forms, such as explaining how to participate, identifying the appropriate practices, explaining specific tools, categorising, and summarising ideas. There is a lack of common understanding of what the open initiative is addressing (Jarzabkowski & Balogun, 2009). Throughout the process, there is also a loss of context and argumentation that has been noticed, where throughout the different phases of open strategy the information is not transposed (J. Bryant et al., 2011; Van der Steen, 2017). Organizations did not pay attention to the communication of the strategic matters and decisions, to those that were not involved in a particular stage. The establishment of various feedback loops throughout different stages of the open strategy initiative, with intermediary checkpoints are important to allow for sensemaking with the different actors previously excluded (Amrollahi & Rowlands, 2018; Harrison et al., 2010; Zaggel et al., 2019). What is most recurring is the need to take into account participant feedback and links directly to the loss of context and argumentation (Deken et al., 2018; Zaggel et al., 2019). This bridges the need to be more transparent and to making the content available after review and formulation, so that the strategic plan is available to all and that the results are openly

communicated to the participants in order for them to understand how their ideas were transformed (Dobusch et al., 2019).

c) Facilitating Accessibility.

A common element throughout several cases is the lack of communication in between the organization and participants of the process, which leads to unexpected outcomes (Castelló et al., 2016; Gegenhuber & Dobusch, 2017). Discussing what the limits of both participants and the organization are in a two-way conversation is crucial (Castelló et al., 2016), as certain cases reveal that not doing this is directly related to lower participation (Denyer et al., 2011). Additionally, the unclear roles of participants are admittedly contributing to the unstable outcomes of the process, as the limits of openness are blurry (Schmitt, 2010; Stieger et al., 2012), the expectations regarding the contribution of participants are unclear, participation is not always voluntary (Dobusch & Kapeller, 2018), and each participant has different preconditions and different needs (Amrollahi & Rowlands, 2018).

Further, several cases indicate different ways to approach the identification of common subjects and topics, either as exploring subjects as they come (Luedicke et al., 2017) or by having multiple agenda setters (Castelló et al., 2016), this helps in having a continuous open debate and ideas flowing in and to establish *dialogue and transparency* in the open initiative. However, there is the need to create working groups of the same interest to avoid conflicting interests of various participants (Seidl & Werle, 2018), although different interpretations of the same subject are actively encouraged. In most open strategy initiatives, not all ideas can be

worked upon nor can they be implemented for several reasons (Deken et al., 2018; Gegenhuber & Dobusch, 2017); this is something that must be discussed with the participants upfront.

When discussing transparency, it centers around being transparent in the process and being transparent about how stakeholder ideas are acknowledged (Dobusch et al., 2019; Gegenhuber & Dobusch, 2017). With regard to accessibility, there is a responsibility of the information withholders to share with others (Luedicke et al., 2017). Organizations and top management are responsible for providing information input for those participating in the process and who do not necessarily have all the technical knowledge required (Denyer et al., 2011; Zaggl et al., 2019), because of their position within the organization. Transparency is also about the engagement toward implementation of said ideas being formulated and generated. Being transparent and clearly communicating in both process and content levels has shown to help in establishing the acceptance to participate in the open strategy initiative (J. Bryant et al., 2011; Dobusch et al., 2019; Gegenhuber & Dobusch, 2017) .

Throughout the different readings and analyses of the cases, an opposition in between *inclusion as in quantity and inclusion as in engagement* can be distinguished. In many open strategy initiatives, the idea was focused on opening as much as possible (Amrollahi & Rowlands, 2017; Bjelland & Wood, 2008; J. Bryant et al., 2011; Denyer et al., 2011;) , to have higher participation by including an increasing number of stakeholders to have a broader sample of people for the idea generation phase. Although, in some cases, not all participants are always relevant to discuss every subject (Luedicke et al., 2017). Participation levels vary depending on how many people are interacting together. In certain cases, participants leave the working group to set up another one, addressing their own interests (Seidl & Werle, 2018). Occasionally, keeping working groups to smaller themes and creating new ones when needed (Dobusch &

Kapeller, 2018; Seidl & Werle, 2018; Van der Steen, 2017) can be an interesting solution to really enable each participant to see how they can contribute at their level, even if the intention is to open the initiative to everyone and to reach out to many people. The link between the quantity of people involved and the quality of the content generated is also something that has been underlined throughout the various cases (Amrollahi & Rowlands, 2017; Stieger et al., 2012). The low accessibility of the practices, along with the low informational input from organizations (Castelló et al., 2016; Dobusch et al., 2019; Dobusch & Kapeller, 2018) builds toward variable outcomes in terms of quality of the process. In several cases, the ideas submitted were either not strategic or not relevant to the organization and its business (Bjelland & Wood, 2008; Denyer et al., 2011; Stieger et al., 2012). Ironically, often the outlying idea or peripherally constructed idea is a game changer for the organization (Regnér, 2003); however, such ideas are often overlooked when processes mainly focus on wide participation, or the quantity of ideas generated in an allocated period. In some cases, we can see that the higher number of people involved leads to disengagement and lower participation levels (Bjelland & Wood, 2008; Luedicke et al., 2017; Stieger et al., 2012) than what was originally expected from the organizers of the initiative.

Open strategy processes do not consider the accessibility of the proposed practice (online vs offline, synchronous vs asynchronous, language, location, etc.) nor the proficiency of the participants (knowledge of a specific sector, industry, topic, etc.) to allow them to participate in the open strategy initiative (Denyer et al., 2011; Dobusch et al., 2019; Dobusch & Kapeller, 2018; Harrison et al., 2010). In several cases, a platform is created to increase participation (J. Bryant et al., 2011; Dobusch et al., 2019; Harrison et al., 2010). However, occasionally, the difficulty of using the platform undermines this intention. Moreover, because in many open strategy processes, the metrics focus only on the quantity of ideas produced in a process, often

the IT platforms enabling the wider participation are constructed in the form of a game (Stieger et al., 2012). The tools implemented are not always accessible to all the people integrated in the process and different ways of making participation more accessible through practices, such as in physical spaces (J. Bryant et al., 2011), are underestimated in the race towards broad involvement.

d) Organizing Group Dynamics.

The different case studies reveal that there are multiple flows of people within the processes, people entering or exiting the process, irrespective of whether it is voluntarily (Denyer et al., 2011; Luedicke et al., 2017; Seidl & Werle, 2018). In several cases, participants decided to voluntarily exit the process and stop contributing because of information surplus (Luedicke et al., 2017), low or non-accessibility of a practice (Dobusch et al., 2019), the of participating (Van der Steen, 2017), or low accountability of organizations (J. Bryant et al., 2011). Acknowledging that participants not only exit the process at some point in time but can also enter in any of the later phases of the process is very important, as this adds a layer of complexity to stakeholder practice, and information management. These multiple entries and exit points of participants induce variation in the level of openness and requires different practices, tools, and methods (Amrollahi & Rowlands, 2018; Gegenhuber & Dobusch, 2017; Schmitt, 2010), which makes it difficult to reach a consensus or at least aim at a co-understanding and agreement of the structure and outcome of the process. Moreover, the participation of top or middle management in the global strategic conversation in certain cases is contested and particularly when contributions are not anonymous or when top management oversees evaluation of ideas (Amrollahi & Rowlands, 2018; Dobusch et al., 2019; Van der Steen, 2017). Additionally, the context and argumentation

of an idea is often lost, as exclusionary practices are put into place for the reviewing, selecting, and formulating the strategic plan (Harrison et al., 2010; Jarzabkowski & Balogun, 2009).

One of the elements that really characterizes the group dynamics is the control that is executed over the process and the power balance that exists from it. In many of the cases, there is an exclusionary decision-making process, in which decisions can be made by only one person or a small group, for the whole collective (Denyer et al., 2011; Dobusch et al., 2019; Luedicke et al., 2017). Occasionally, there is coercion in idea selections, where the ideas are reviewed by a small steering committee favoring ideas close to their own conceptualization or expertise. Top management mostly controls the process and the content of the process, they set the limits to the open strategy initiative (Amrollahi & Rowlands, 2017; Denyer et al., 2011) and leave little space for shared decision-making, and decide upon the topics to be discussed (Amrollahi & Rowlands, 2017; J. Bryant et al., 2011; Stieger et al., 2012), occasionally already preparing the outcome of the process and guiding participants toward the said outcome (Van der Steen, 2017). However, participants also have power over the process, and this is where tensions emerge, particularly when participants are external to the company (Zaggl et al., 2019), where they can influence the leverage they have by countering the organization and its products, thereby creating new clusters in communities that detain a certain leverage and power to negotiate more openness (Jarzabkowski & Balogun, 2009).

Openness challenges the traditional ways of implementing strategy and the process of doing so. As the process becomes more open and more people are involved, there are more needs to be attended and a greater variety of practices are expected (Amrollahi & Rowlands, 2017; Bjelland & Wood, 2008; J. Bryant et al., 2011; Seidl & Werle, 2018), which need to be adapted to the people involved in order not to risk of missing out on an opportunity or an idea or a

specific person in the process. Organizations also need to be able to accept that the process must evolve for greater acceptance, as those unexpected turns in the process arise and this requires flexibility (Dobusch & Kapeller, 2018; Harrison et al., 2010). In numerous cases, low participation rates come from the fact that the practices are not adapted to the participants. Occasionally, face-to-face settings can be more relevant than online platforms, which are often used in open strategy initiatives to attempt to broaden the sample of people participating. Occasionally, there is also a need to switch from dialoguing to broadcasting or the other way round (Gegenhuber & Dobusch, 2017). All this relates back to the different tensions that arise from open strategy processes.

e) Encouraging Procedural Openness.

Through the different cases, it was rather evident that participants have different needs and capabilities which impact the overall openness and participation in the initiative. Several needs can be identified throughout the different case studies. First, the need for flexibility. In several case studies participants do not necessarily participate voluntarily (Amrollahi & Rowlands, 2017), which can lead to lower engagement, lower interactions, or selective participation (Castelló et al., 2016; Jarzabkowski & Balogun, 2009; Van der Steen, 2017). This need for flexibility is characterized by the need to be able to participate at different moments in time in the process, the need to adapt the practices to the participants, to adapt the tools to the usage of the participants, and to be able to access information even when excluded (Luedicke et al., 2017; Seidl & Werle, 2018; Van der Steen, 2017).

Related to this need of flexibility is the need for more time and availability in the process (Bjelland & Wood, 2008; J. Bryant et al., 2011; Denyer et al., 2011; Dobusch et al., 2019). In

certain cases, participants were not able to participate, either because of technical or time constraints (Stieger et al., 2012). By enabling participants to contribute only during a certain period of the day and with constraints in time related to the duration of the initiative, participants do not have sufficient time to interact, read, classify, or contribute to open strategy ideation and formulation (J. Bryant et al., 2011). Allowing and providing time for all participants to participate in accordance with their own rhythm, for them to explore all the rich content, and interact on the different ideas and to reflect on them is essential to foster participation. However, occasionally, giving more time does not necessarily increase participation either, which is evident from certain cases (Stieger et al., 2012).

The need for guidance is closely related, as organizations need to be assisted in the new process of co-constructing and finding the balance between quantity and quality, duration of the initiative, adapted practices, and the roles and involvement of the organization and the involved parties (Denyer et al., 2011; Schmitt, 2010; Stieger et al., 2012; Van der Steen, 2017). All these aspects lead back to the need for guidance and facilitation. Organizations are often confronted with this dilemma and either set the level too high and are not able to manage the complexity this incurs (Jarzabkowski & Balogun, 2009) or they set the level too low and risk participants exerting their power and influence to obtain a higher level of openness (Zaggl et al., 2019), or face low engagement. Hence, the cases in which the process was faced with the fewest problems were those in which organizations and participants identified the mutual benefits of engaging with each other and co-defined the process (J. Bryant et al., 2011; Schmitt, 2010). Only a few cases initiated a solid communication process to find co-alignment through sense-making and maintained higher norms of transparency (Amrollahi & Rowlands, 2018; Harrison et al., 2010). However, these fluctuations in openness are also induced by the unclear role of participants, who

attempt to navigate through the blurry lines of openness and expectancies. Indeed, there were very few cases in which participants had clearly defined roles, good comprehension of what was expected from them, and the extent to which they were able or open to contribute, interact, form, and influence the strategy-making process (Bjelland & Wood, 2008; Jarzabkowski & Balogun, 2009; Van der Steen, 2017). Thus, higher transparency brings greater support from the community.

The need of recognition is connected to this. Stakeholders are required to understand how their contribution has been acknowledged (Amrollahi & Rowlands, 2018; Jarzabkowski & Balogun, 2009) as well as to see and understand that their needs are addressed (Zaggl et al., 2019), which ultimately leads to inclusion as in engagement rather than inclusion as in quantity. The decision to be open from the very beginning (Gegenhuber & Dobusch, 2017; Schmitt, 2010; Zaggl et al., 2019) can really provide for high transparency and allow for those common interests and agreements to be discussed and to set the rules of the game in advance with all the participants. The co-creation with the community and participants allows for discussions to understand those needs, encourage participation, build credibility, and raise general awareness around the initiative (J. Bryant et al., 2011; Luedicke et al., 2017).

f) Building Legitimacy and Buy-In.

In the organization of open strategy initiatives, the cases reveal that building legitimacy and buy-in was one of the most important elements. Controlling openness, whether it is controlled by organizations or by participants, is a difficult task, as it has multiple implications and consequences for the process, whether intentional or not. This is specifically what is lacking in most cases analyzed. There is no clear governance of the process and its many ins and outs

(Dobusch et al., 2019; Harrison et al., 2010; Jarzabkowski & Balogun, 2009). This legitimacy can be fostered through several elements, to create the right conditions for an open strategy initiative. Crowds and communities do not react in the same manner toward openness, thus turning crowds into a community; this is one way to develop inclusion as in engagement of participants (Dobusch & Kapeller, 2018; Gegenhuber & Dobusch, 2017; Stieger et al., 2012). This legitimacy is created by organizations listening to stakeholders' different needs and expectations (Bryant et al., 2011; Castelló et al., 2016; Deken et al., 2018). It relates back to creating the sense of community before implementing the open strategy initiative, which is resource-intensive, and even more as the openness levels increase. Thus, it is important that organizations are able and are prepared to give the appropriate resources for the initiative before engaging themselves within said initiative (Castelló et al., 2016; Van der Steen, 2017). Moving toward and transitioning into openness, requires a cultural change and relates back to the intentions of engaging within openness and open strategy for an organization. Organizations can have different objectives for the initiative and can be looking for various benefits related and associated to open strategy initiatives. They can have multiple reasons to engage in open strategy initiatives—either to prevent crises, in case of sensible subjects, to respond to a contingent factor in times of uncertainty, or because of their organizational culture and nature—which are not always aligned or considering stakeholders' needs (Bjelland & Wood, 2008; J. Bryant et al., 2011; Deken et al., 2018; Luedicke et al., 2017). However, an element becoming more visible throughout the different cases is the importance of explaining the “why” of the initiative—to show what the organizations' engagements are toward this openness and implementation of the ideas. Underlined in several cases, was the need for organizations to act on the proposed ideas and to respect the collective decision (Bryant et al., 2011; Gegenhuber & Dobusch, 2017;

Schmitt, 2010). However, top management bears the legal and financial accountability for the organization as opposed to the participants, which occasionally constrains the possibilities of implementing the generated ideas (Luedicke et al., 2017).

In building this legitimacy and buy-in, the diversity of the participants is key. Although in most open strategy initiatives and processes, diversity is limited to internal actors of an organization (Harrison et al., 2010; Seidl & Werle, 2018; Van der Steen, 2017). External parties are generally underrepresented. Diversity links back to several notions discussed previously, concerning the selection of the right people at the right moment of the process. Relating back to the process guidance and the organizing of collaborative dynamics, the roles of the different actors are important to foster legitimacy of the entire process and initiative, as evidenced from the cases, several people have clearly defined roles or take on roles which contribute to a more fluid process. In certain cases, a facilitator is called upon to regulate and monitor the process, or a specific group oversees coordinating with the organizers (J. Bryant et al., 2011; Stieger et al., 2012; Van der Steen, 2017).

4.2.4. Discussion and Implications

Whittington et al. (2011) revealed that the role of strategists will become more modest with the opening of strategy work, moving toward the importance of process skills such as coaching, facilitation, and communication and away from traditional analytical skills (Whittington et al., 2011). Facilitation is a tool integrated by numerous organizations and groups as a method that will increase inclusion, involvement, participation, and equality of all members (Prendiville, 2008). This section of the paper brings forward the notions of structure, neutrality, and purpose in openness as being fundamental to managing the complexity arising from open

practices and to allow participation, inclusion, and decision-making to be balanced in open strategy and, as will be suggested in the following section, also in the closely related field of stakeholder engagement that has emerged as being a central topic in open strategy.

Open strategy is closely related to the stakeholder engagement research field, as both the literature of business & society and management & strategy overlap (Kujala et al., 2022, p.1140). stakeholder engagement refers to the aims, activities, and impacts of stakeholder relations in a moral, strategic, and/or pragmatic manner (Kujala et al., 2022, p. 1160), and focuses on participation (how do they participate?), inclusion (who is included?), and democracy (why do they have the right to some form of decision-making power?), which aligns with the topics discussed in the open strategy field to unpack the complexity of stakeholder engagement (Mori, 2010; Wenzel et al., 2022). Stakeholders are to be understood as being individuals, groups, or organizations that affect or are affected by organizational activities (Freeman, 2010). Related constructs of stakeholder collaboration (joint activities with external stakeholders), stakeholder inclusion (presence of stakeholders in organizational activities) and stakeholder democracy (participation of stakeholders in the processes of organizing, decision making and governance) closely link open strategy and stakeholder engagement together, each having their own nuances (Desai, 2018; Kujala et al., 2022, p. 1143; Matten & Crane, 2005).

Bringing together the literature on open strategy and stakeholder engagement, and conducting the QMS, sheds light on the question of polyphony (Wenzel et al., 2022) in more open contexts of organizing and how to cope with it; this also further emphasizes the importance of process skills in organizations engaging in more openness, whether it be here through open strategy or in other domains such as open innovation, open government, or open science, answering directly the call for cross-fertilization of research in open organizing across different

domains (Splitter et al., 2023). In contrast, while open strategy focuses on who's contributions are meaningful, stakeholder engagement focuses on "stakeholders' willingness to participate in business value creation" (Kujala et al., 2022, p. 1153). This slight just underlines the interest of bridging both literatures, as the various perceptions of a similar topic in different domains can be very insightful for both literature streams.

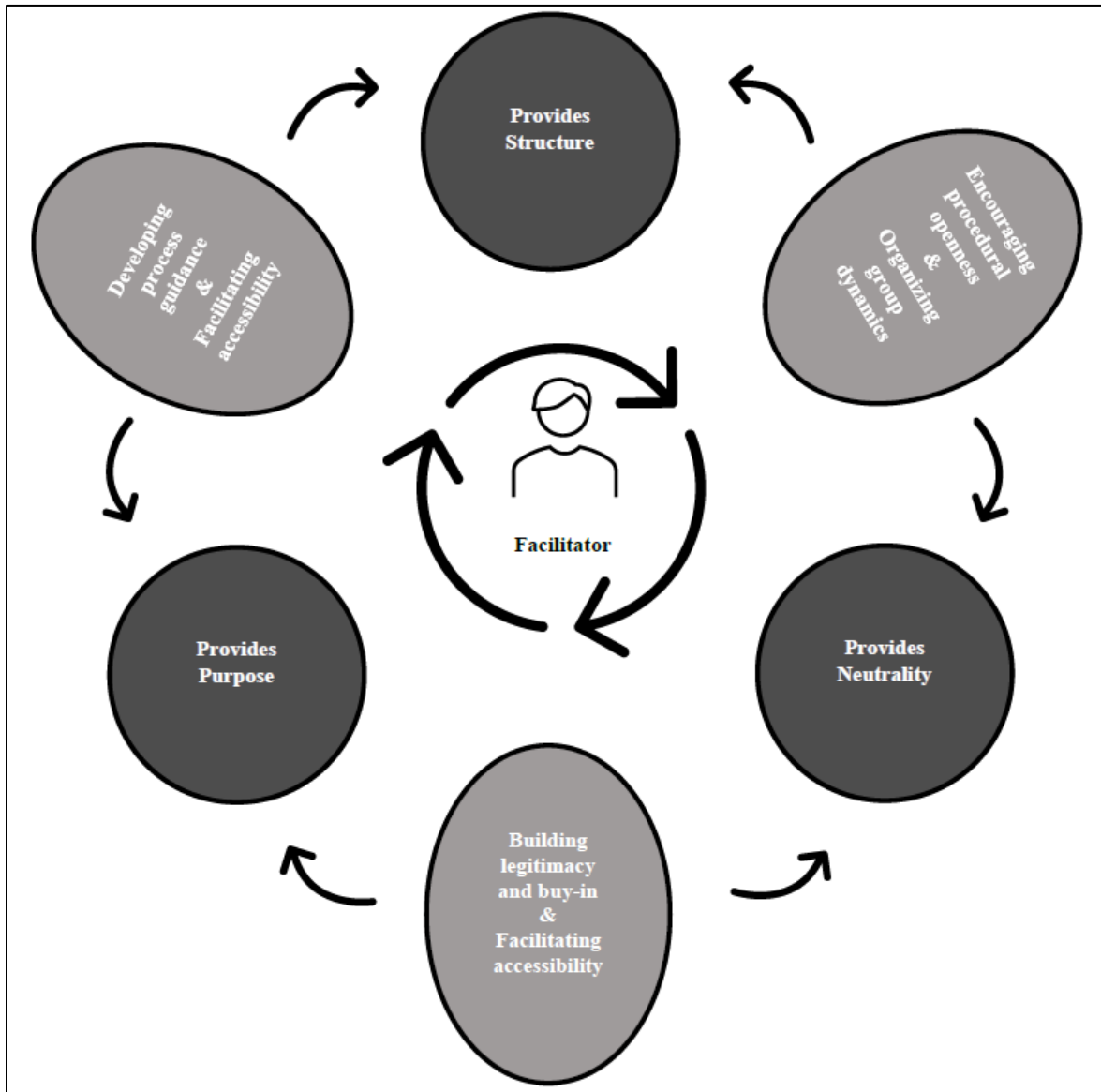
Organizations engage in openness in strategy-making processes expecting one or more of the following outcomes: (1) to generate and crowdsource ideas concerning a firm's strategic direction, (2) improve strategy, (3) foster inclusion and collaboration among the participants, (4) increase transparency and offer additional insights and understanding of an organization's strategy, (5) support strategic decisions, and (6) to transform an organization's strategy process (Hautz et al., 2019). Here, the focus is set on the organization and its performance rather than on the relationship the organization could build with its participants. In stakeholder engagement, recognition and respect (Noland & Phillips, 2010), doing good (Miska et al., 2014), empowerment of stakeholders (Ghodsvali et al., 2019), or the consideration of stakeholders' wants, needs, and capabilities (Todeschini et al., 2020) are considered to be necessary for stakeholder engagement to be morally positive (Kujala et al., 2022, p. 1153).

Kujala et al. (2022) suggested the need to pursue research on the dark side of stakeholder engagement, as stakeholder engagement research was focusing mostly on the positive relations between stakeholders and organizations. The literature on open strategy and the objective of this paper, in consolidating the complexities of open strategy initiatives, sheds light on the dark side that is called for and "explores the intentional and unintentional harmful and negative aspects of the aims, activities and impacts of stakeholder engagement" (Kujala et al., 2022, p.1146) and of open strategy.

In the next section, a particular focus will be set on facilitation and the role of facilitators, who sit amidst the three constructs developed from the QMS and are brought forward in this article as being the three elements to keep in balance in order to reduce the complexities arising with these new forms of open organizing. Providing structure, purpose and neutrality is a crucial role for a facilitator, as his/her role is to guide individuals and groups toward what they want to achieve, and to encourage them and remind them of their responsibility to complete a task (Prendiville, 2008); this is presented in [Figure 7](#).

Figure 7

The Role of Facilitators in Open Processes



This model introduces the elements of structure, purpose, and neutrality as an alternative to the traditional inclusion/transparency continuum that is brought forward in open strategy literature (Whittington et al., 2011) to guide and analyze open strategy initiatives. Where inclusion is defined as “the participation in an organization’s ‘strategic conversation’, the

exchanges of information, views and proposals intended to shape the continued evolution of an organization's strategy" and transparency as "the visibility of information about an organization's strategy, potentially during the formulation process but particularly with regard to the strategy finally produced" (Whittington et al., 2011, p. 532). This paper suggests structure (providing an accessible, transparent, and inclusive environment), as in the crafting and monitoring of the practices and process; purpose (providing informed, legitimate, and relevant practices and processes), as in the two-way relationship building between participants and organizations; and neutrality (providing equality, flexibility, and openness in the practices and processes), as in the governance and power balance of all actors involved. In the next section, these three elements are presented as being interrelated, as structure enables neutrality and neutrality enables purpose, as purpose then again allows for structure to develop and be balanced.

A) Providing Structure and Neutrality.

Open strategy processes are dynamic in nature and have varying levels of openness through time, as organizations move along the axes of transparency and inclusion (Hautz et al., 2017). The levels of openness of a process thus evolve dynamically with the levels of transparency and inclusion with which an organization engages. When it comes to opening the strategy making process, often processes are designed by top management or consultants in organizations. It is very seldom that those who will participate in the process are integrated in the design of the said process, in most cases, because organizations want to retain control over the process. In the QMS, this is illustrated by the code "Encouraging procedural openness.". The role of the facilitator begins even before the ideation phase. Amrollahi and Rowlands (2018)

suggested the addition of a pre-planning phase to the process of open strategy. Although not exactly in line with what they bring forward in their paper, the aim here is for the facilitator to meet directly with the participants who will be involved and with the person or group that formulates the willingness to open the process more broadly. Similar to that revealed through the QMS for open strategy, research in stakeholder engagement has revealed that entering in a two-way communication process with its stakeholders is part of the activities an organization has to conduct in the process of open organizing (Kujala et al., 2022; O’Riordan & Fairbrass, 2014). The facilitator’s role is to work with all shades of opinion within a group, to encourage discussion, honest expression, respect for other opinions and to create an atmosphere whereby all perspectives can be included (Prendiville, 2008, p. 10). This can only be attained if the facilitator knows what the groups’ needs are, what the overall aim of the project is, how many people will participate and whether the people involved have already worked together previously and foremost outline whether the participants’ and the organization’s aims are compatible. The facilitator’s role is closely linked to our code about “Organizing group dynamics,” as he/she is supposed to possess sharp knowledge of how groups are formed, developed, and, occasionally, destroyed (Prendiville, 2008, p. 28).

Academics have studied how participation has evolved through the transitioning of several modes of governance (O’Mahony & Karp, 2022). They have found that changes to the access (the degree of openness and usability of a platform for participants) and control (the right to determine the rules) of a system supporting open innovation should be made cautiously to be open, but sufficiently structured to encourage participation. Moreover, they emphasize the need for collective governance, which induces higher levels of participation and distributed leadership. They found that distributed leadership emerges when distributed participation is

possible and there is a collective choice over platform participation rules (O'Mahony & Karp, 2022, p. 27). Their study relates to the settings of open strategy and their conclusions can be transposed to open strategy processes and the role facilitation and facilitators play in these processes. Further, procedural openness is defined as the predetermined and transparent procedures restricting opportunities for individual actors or informal groups to change “the rules” throughout the process. Therefore, the overall structure of the process needs to exhibit a “closed quality” to allow for greater openness (‘closing for the benefit of openness’ (Dobusch et al. 2019, p. 363). Thus, openness exists through closure and requires predetermined rules. Collective governance is thus a precondition for content-related openness and, consequently, increased transparency. However, in facilitation there are also boundaries to be drawn and respected when working with groups. Facilitators need to outline the extent to which they will participate in the process so that the group is aware of the facilitator’s role and boundaries. As such, a facilitator is as responsible for drawing his/her own boundaries, to remain neutral in the process, as he/she is responsible for guarding the respect of boundaries among participants (Prendiville, 2008, p. 23).

B) Providing Neutrality and Purpose.

The process of open strategy is still far from being smooth, and the different papers analyzed reflect very well the complexity of managing this new approach to strategy-making and the multiple factors to consider. Thus, the level of openness throughout the levels of transparency and inclusion varies with different scenarios and particularly with the level of complexity that an organization can manage. As open strategy processes unfold, organizations struggle with the intentions set for the initiative, how participants react to the practices of openness, and thus sometimes lose sight and are overwhelmed. This leads to a loss of legitimacy and buy-in of the

participants, who feel and are excluded from openness as soon as an organization feels it is beginning to lose its grip. However, the QMS reveals that it is not essential to have many people in all phases, but rather a more well-balanced selection of people and an increased level of transparency, thereby allowing for a more proximal management of participants and, thus, recognition of their value and purpose.

Therefore, it really is all about letting the stakeholders find their position and participation level within the whole process, giving everyone the opportunity to participate, giving them multiple opportunities to do so through different ways, to accommodate with those different needs, aspirations, and motivations but simultaneously providing equal opportunities for everyone to participate and accentuating the neutrality in the process. In stakeholder engagement, the same debate arises around this challenge, thereby leading to conflicts within organizations who do not consider the needs, motivations and roles stakeholder play (Mori, 2010). Indeed, several cases have revealed how there are different ways of being open in virtue of opening the strategy process, such as broadcasting (transparently communicating relevant information), dialoguing (asking users for opinions and engaging in conversation) or including (involving external audiences in decision-making), which represent an organization's three levels of engagement with its stakeholders (Gegenhuber & Dobusch, 2017, p. 338). stakeholder engagement literature also brings forward a multitude of activities to engage in stakeholders involvement (Kujala et al., 2022), which is in alignment with the multiple practices of open strategy. All ideas count, in that there is need to take in as many ideas as possible, while simultaneously balancing the information overload and the manner in which ideas are processed to really guarantee this balance between the number of people involved in the ideas generated, the quality of the content, and the quality of the participation experience in the open strategy

initiative. This leads to the overall conclusion that higher numbers of people and content generated often leads to lower levels of engagement, discussion, and openness of the entire process.

Facilitators are expected to have a humble attitude and be aware that their role is to help the participants and organization to work collaboratively and effectively. Thus, the facilitator keeps a distance from the outcome of the process, which is entirely up to the group; however, the facilitator is in charge of implementing the process that will lead to a common purpose, defined before the initiative begins (Prendiville, 2008). With regard to the overall purpose of an open strategy initiative, the more open the initiative is, the longer it takes to implement; thus, the duration of the initiative is important to calibrate in the right way. The levels of openness change and vary throughout the process, as people come and go, entering and exiting the process at different steps in time and even more so if the process is long. Here, the facilitator serves as a collective memory throughout the process for the participants, which allows for the information flow to continue and maintain a level of openness and transparency, where usually there would be exclusion. However, it is crucial that the facilitator remembers that receiving and transmitting information is a two-way process, where the message is interpreted in many ways based on several social factors (Prendiville, 2008, p. 21), and serve the call for neutrality by providing equal access to information.

This is related to developing process guidance and the need to have a clear definition of the boundaries of the strategy initiative to motivate people to participate. When the outline of the process and rules of openness in the organization are clear, it helps participants to know to which extent they are expected and allowed to take part in the process, it gives them a purpose. The various roles of each person should be clear before beginning the process and this relates back to

the need of co-developing the open strategy initiative, which is also discussed in stakeholder engagement literature as being a form of high quality collaborative relationship (Bridoux & Stoelhorst, 2016). The role of the facilitator is very important at this stage, as he/she guides organizations through the setting of intentions, openness levels, practices, and roles to give to participants, with a neutral perspective, to build toward a shared and common purpose for the overall initiative.

C) Providing Purpose and Structure.

Facilitation is based on recognizing the value of each group member and identifying and utilizing her/his skills, experience, creativity, and analysis. The understanding and sharing of skills enables individuals and groups to plan for development and change (Prendiville, 2008, p. 14). Facilitation is a method to work with people and empower them to perform a task. The role of the facilitator is to encourage participation and enable participants to value and develop their expertise and skills.

In open strategy, one of the key points for success is the process of consensus building. Indeed, with the various and numerous stakeholders involved in the process, this is often a tedious and complicated step. Since, traditionally, decision-making and strategy formulation were incumbent on top management, open strategy processes fail to fulfil the ambitions of Tavakoli et al.'s (2017) ideal-typical definition of open strategy when it comes to democratic decision-making. In fact, in several cases, exclusionary practices and forms of closure take place during consensus building, and the principles of inclusion and transparency are often set aside. However, the definition also evokes the intertwining of traditional and open practices in the

process, which one could argue is the case when consensus building and decision-making are undertaken traditionally in parallel with other open practices. This is in line with the definition of several authors who argue that open strategy is not a democratic strategy and that decision-making rights are not transferred (Whittington et al., 2011; Hautz et al., 2017). Thus, organizations are in need of process guidance, and the role of the facilitator is to structure and organize group dynamics, encourage procedural openness, and develop process guidance. Therefore, a facilitator requires a wide range of skills to intervene effectively and to encourage positive development of the group. Being aware of the needs of individual group members or being able to judge what those needs might be makes for better facilitation.

This brings forward the notion of accountability, which refers to being responsible for your decisions or actions and being expected to explain them when asked. This point is very important, as several cases question twice the accountability of organizations. First, they question whether organizations will be able to commit to implementing the strategy that was or will be generated through the open strategy process, or even with respect to the recognition an organization has toward its participants, whether it will integrate their suggestions or explain why they were withheld.

The facilitator, through the pre-planning phase, ensures that all parties involved know what the aims are, what the modes of participation are going to be based on the group's expressed needs and the facilitator's expertise in group dynamics, and the intended outcome.

However, occasionally, participants and, particularly, communities can retain a high level of knowledge on a certain subject or even retain skills an organization lacks or take on a specific role within a group. This in turn gives them the power to push for more openness in the design space (Zaggl et al. 2019) or at least for it to be considered, unless the organization fails to see

this, which then leads to a broken process of open strategy. The neutral position of the facilitator encourages procedural openness, builds legitimacy and buy-in and facilitates accessibility and organizes group dynamics for all participants equally, to raise awareness, engagement, and purpose of the open strategy initiative. The role of the facilitator is to recognize when these needs are expressed and whether he/she needs to intervene (Prendiville, 2008).

Further, the facilitator must encourage participation and challenge behavior which inhibits it by creating an environment in the group where people can choose to contribute and where it is safe for them to do so (Prendiville, 2008, p. 56). Facilitation is about examining both content and process, both for the individual/group and for the facilitator; by doing so the facilitator gains an understanding of the individual/group's needs and can adapt the practices deployed and help in resolving conflicts. Thus, participation does not imply actively participating in all phases and practices; however, the role of the facilitator is to guarantee that each participant has the opportunity to do so (Prendiville, 2008, p. 56).

4.2.5. Conclusion and Future Research Agenda

First, this article consolidates the literature and theory on open strategy by bringing together various research papers and research contexts under the same theoretical constructs and analyses, thus extending prior work done by scholars in the field. This article sets a first step in the direction of investigating the dark side of stakeholder engagement (Kujala et al., 2022) by comparing open strategy practices of stakeholder involvement and suggests three constructs (structure, purpose and neutrality) to consider as a means to harmonize activities that once brought together can have negative impacts. The model presented in this paper thus extends theorization and contributes to the open strategy literature, joining the discussion brought

forward by Mount et al. (2020), who reveal anonymity, parallelism and group memory as enablers of inclusion to democratize access and control and provide equal opportunities to participants. Second, they also mention process structuring and information structuring as enablers of inclusion. These constructs are very closely related to those presented in this paper and thus extends the theorization on open strategy but also more broadly to stakeholder engagement and openness literature, as the model presented can be applied to a more general level of open organizing (Splitter et al., 2023). This paper also sheds light on the fact that organizations engaging in open strategy processes generally lack facilitation skills and approach openness and stakeholder engagement with little to no prior knowledge or expertise regarding group work, inclusion, and participation. Thus, it is suggested that facilitators and facilitation skills are essential to these types of open processes and that through their set of skills and competences, facilitators enhance the overall experience of inclusion, participation, and democracy in stakeholder engagement and open strategy processes. This is in line with the projection of what the strategy profession might look like in the near future, where organizational skills will be valued over the traditional analytical skills required (Whittington et al., 2011).

The literature on open strategy represents a multitude of organizations, each evolving in their own context and with their own resources. From the QMS, it is evident that most organizations cannot mobilize the power, resources, and quantity of people, such as in the innovation jam of IBM (Bjelland & Wood, 2008) or Wikimedia's open strategy initiative (Dobusch et al., 2019), nor can they all have an extreme approach to open strategy, such as the Premium Cola collective (Luedicke et al., 2017). Even though there are numerous examples where open strategy was in some ways successful, these initiatives were often triggered by a

situation of uncertainty (Franken & Thomsett, 2013; Schmitt, 2010). An open strategy initiative, even though effective in these instances, comes with a high level of organizational complexity (Dobusch et al., 2017) to manage. One way to reduce this complexity would be to adopt open strategy as a continuous process rather than a timely strategy-making practice, where facilitators are either purposefully integrated into the process or naturally designated by participants to coordinate, monitor, and facilitate the process. The pragmatic component of stakeholder engagement addresses the aspect of time as well, thereby denoting this ongoing nature of stakeholder engagement accompanied with temporary processes (Kujala et al., 2022). A continuous dialogue both with internal and external stakeholders would enable the establishment of working groups over time, based on volunteerism, interest and competences. However, this is only possible by reviewing the structure and culture of an organization that would adopt a continuous approach to the pre-planning phase (which would thus allow the organization to mobilize fewer resources but more well-balanced ones) and to open strategy in general, thereby completing this with several timely phases of idea-generation and follow-up phases. This aspect opens up an interesting path for future research.

The role of facilitators is brought forward theoretically in this article and should be explored more extensively empirically, as— to the best of my knowledge—the impact of facilitation and the extent to which facilitators enable open strategy in organizations has received little to no attention thus far. This opens up a future research agenda looking into the impact of facilitators on stakeholder engagement, the impact of facilitators on the quality of the content produced or even the role of facilitators as boundary spanners (Lissillour & Sahut, 2021; Mell et al., 2022). Experimental research could also investigate the benefits of facilitating strategy implementation after an open strategy initiative and the role facilitators could have in such a

setting (Friesl et al., 2021). Finally, academics could be interested in further investigating the nature of governance in an open strategy process and how governance is constructed considering the multiple stakeholders—which is possible through the field of collaborative governance (Ansell et al., 2020; Ansell & Gash, 2008)—who are dynamic, ever-changing, and growing throughout the process.

Chapter 5: Inclusion in Open Strategy—Sense of Belonging and Authenticity

The following section presents the second standalone article developed in this thesis. It is an empirical article that adopts a longitudinal case study approach. This article is based upon the case study presented in Chapter 3 and comes as the first of two empirical articles that aim to investigate the concept of open strategy through a strategy-as-practice approach. Table 6Table 4 provides a summary of the research process.

Table 6

Summary of the Research Process—Article 2

Framing	<p><u>Research question:</u> How can organizations enhance participant inclusion in open strategy processes and leverage the interplay between inclusion and transparency in strategy initiatives?</p> <p><u>Research objectives:</u> By delving into the multifaceted dimensions of participant inclusion and transparency, this study seeks to unearth practical strategies that organizations can employ to navigate the challenges inherent in open strategy and uncover whether another option is possible aside from participation and inclusion (Mack and Szulanski, 2017).</p>
Data collection	<p>The study employed a grounded theory approach for data collection, combining real-time and retrospective methods from diverse sources including interviews, documents, observations, artefacts, and secondary data. Spanning almost two years, the data collection aimed to comprehensively investigate the strategizing process, emphasizing inclusion, and was analyzed iteratively using an inductive approach. This methodology offers a strong foundation for exploring the complex dynamics of strategic management and the role of inclusion in it.</p>
Data analysis	<p>The data analysis utilized NVIVO for iterative coding and analysis throughout the data collection. It reconstructed the strategic process chronologically, identifying stages such as stakeholder listening, strategy formulation, and implementation. The study employed the "outcome-driven narrative" method to explain participant inclusion's evolution in the process, integrating micro and macro levels. Open-coded interviews revealed categories and themes, which were further refined into second-order themes like holistic engagement and empowerment. The analysis culminated in identifying trust, significance, and temporality as aggregated dimensions supporting inclusion in open strategy processes. This approach sheds light on how participant inclusion is fostered across various stages and temporal periods in strategic management.</p>
Findings	<p>The findings are divided into four distinct time periods. The first period (March 2019–July 2019) involves the initiation and ideation phase, featuring a diverse kick-off event and stakeholder consultations. The second period (July 2019–March 2020) covers the formulation phase, marked by the engagement of general directors and store managers, followed by closed-room work with a smaller group. The third period (March 2020 –December 2021) pertains to planning and initial implementation, including the cancellation of a convention due to the pandemic, leading to the creation of a documentary-style presentation. The fourth period (December 2021–October 2022) delves into the ongoing implementation phase, emphasizing tools and frameworks developed for this stage. This process portrays holistic engagement, empowerment, and alignment, thereby underpinning the organization's commitment to participant inclusion and collaborative alignment throughout the strategic management journey.</p>
Discussion and conclusion	<p>The discussed case study illustrates the implementation of an open strategy approach within a multinational organization. The study emphasizes the role of trust as a pivotal enabler of inclusion in the process. The organization's utilization of workshops, a unique perspective of inclusion focusing on belonging and authenticity, and the creation of "zones of inclusion" all contribute to building trust and fostering a sense of inclusion among stakeholders. The study suggests that qualitative inclusion and managing interactions within specific contexts are more effective than pursuing sheer quantity of participants. The interplay between transparency and inclusion is highlighted, with the study indicating that maintaining or increasing transparency even when stakeholders are excluded from certain phases can enhance the perception of inclusion. However, the study acknowledges the need for further exploration of the complex relationship between transparency and inclusion. Overall, the case study offers insights into balancing openness, complexity, and stakeholder engagement in the strategic process.</p>

Revisiting Inclusion in Open Strategy: Trust, Significance, and Temporality

5.1. Abstract

The concept of open strategy has emerged as a transformative departure from traditional strategic management approaches, emphasizing transparency and inclusion in strategy formulation. This article explores the intricate interplay between participant inclusion and transparency within open strategy processes to facilitate strategic initiatives. While the literature emphasizes broad inclusion, the interaction and collaboration amongst diverse participants have been relatively underexplored. This article addresses the question of how organizations can effectively enhance participant inclusion and leverage the interplay between inclusion and transparency in strategy initiatives. Adopting a longitudinal case study approach, this study examined a multinational organization's development and implementation of a new strategic plan by conducting semi-structured interviews as a main data source. The 'Strategy as Process and Practice' framework was adopted, which synthesizes micro-level processes and macro-level outcomes. This study investigated how the organization's practices influenced the participants' sense of belongingness and authenticity, thereby contributing to macro-level outcomes of inclusion within the strategy process. By delving into the multifaceted dimensions of participant inclusion and transparency, this article provides practical strategies for organizations navigating the challenges of open strategy. This study contributes to a deeper understanding of how participant interaction and collaboration impact open strategy implementation by illustrating the interplay amongst trust, significance, and temporality as a holistic approach to enhancing participant inclusion in open strategy processes. Trust creates the foundation for authentic engagement, significance recognizes individual contributions and temporality structures the process for effective participation. This article thereby sheds light on a crucial yet underexplored facet of the open strategy paradigm.

Keywords: Open strategy, inclusion, transparency, case study, strategy-as-practice

5.2. Article 2: Revisiting Inclusion in Open Strategy: Trust, Significance, and Temporality

5.2.1. Introduction

In the rapidly evolving landscape of strategic management, the concept of open strategy has emerged as a transformative departure from traditional viewpoints. Open strategy challenges the conventional paradigm by inviting traditionally excluded participants to engage in the strategy formulation process, redefining the way organizations navigate their strategic course. This novel approach has been underpinned by the guiding principles of transparency and inclusion, both within the organization's internal realms and beyond its boundaries (Chesbrough & Appleyard, 2007; Whittington et al., 2011).

In the pursuit of openness, organizations seek to embrace a diverse array of perspectives concerning their *raison d'être* with the ultimate goal of enhancing the quality of strategic decision-making (Seidl et al., 2019a, p.17). This evolution towards greater openness in strategy introduces a spectrum of benefits and challenges, confronting the dominant cognitive models of top management and urging a departure from conventional conservatism (Seidl et al., 2019b). Indeed, the quest for redefining strategy through openness propels the following fundamental question: 'Who to mobilize, and how to empower, in order truly to challenge conservatism' (Seidl et al., 2019a, p. 17).

While this journey towards openness is marked by significant potential, it necessitates a nuanced examination of how to effectively cultivate participant inclusion within open strategy processes. The approaches of open strategy, whether characterized by limited participation ('Open strategy may involve transparency and inclusion in specific parts of the strategy process

but not others’), co-creation (‘Rather than limiting participation to specific parts of the strategy process, strategy-making can be based on widespread participation in the co-creation of strategies’) or deep engagement (‘... implies that the actors—not only top or middle management—together not only work on the strategies but also define and thereby redefine the ways in which strategy processes are organized’), bear implications for how inclusivity is perceived and harnessed (Vaara et al., 2019, pp. 8-12). The prevalent emphasis on broad inclusion (Bjelland & Wood, 2008; Denyer et al., 2011; Heracleous et al., 2018; Seidl & Werle, 2018) has often eclipsed the equally pivotal question of how the diverse participants interact and collaborate within a strategic endeavor. The challenge is amplified by the interchangeability between the concepts of participation and inclusion (Mack & Szulanski, 2017, p. 386), coupled with a discernible tilt towards inclusion, occasionally overshadowing the importance of transparency in the process.

Amidst these intricacies, the research landscape reveals that the realization of open strategy, while embracing the dimensions of temporality and factuality, falls short in embracing the social dimension (Dobusch et al., 2017). This imbalance has raised questions regarding whether organizations truly include all the relevant stakeholders and recognize the importance of their contributions, leading to tensions and dilemmas that reverberate through the open strategy journey (Dobusch et al., 2017, p. 12; Hautz et al., 2017).

Consequently, organizations grapple with the dynamic tension between fostering openness and managing closure in the strategy-making process (Dobusch et al., 2019) along the three defining elements to openness: (1) access to sensitive information, (2) modes of participation and (3) modes of decision-making (Dobusch et al., 2019). This inescapable tension leads to critical junctures where dilemmas of inclusion, empowerment, disclosure, and escalation

emerge (Hautz et al., 2017). The response to these dilemmas often involves exclusionary practices to modulate the level of openness and mitigate arising tensions (Dobusch et al., 2019, p. 345).

In light of these complexities, scholars and practitioners alike are prompted to explore the avenues through which organizations can guide their open strategy initiatives towards successful fruition. Leveraging the intertwined dynamics of inclusion and transparency, this research endeavors to unravel the intricate interplay that underpins the effectiveness of open strategy processes. The overarching question guiding this investigation is ‘How can organizations enhance participant inclusion in open strategy processes and leverage the interplay between inclusion and transparency in strategy initiatives?’

By delving into the multifaceted dimensions of participant inclusion and transparency, this study sought to unearth the practical strategies that organizations can employ to navigate the challenges inherent in open strategy and uncover what middle ground exists apart from participation and inclusion (Mack and Szulanski, 2017).

In order to answer the research question, this article employs a longitudinal case study design, focusing on a multinational organization’s development and implementation of a new strategic plan. Within the context of the suggested study, the ‘Strategy as Process and Practice’ approach provides a compelling framework to address the research question. This approach aligns with the notion of a combinatory view that synthesizes the strategy process and practice traditions allowing micro-level processes and practices to be linked with macro-level outcomes (Burgelman et al., 2018). The exploratory nature of the case study allowed for an in-depth examination of how the organization’s practices and processes influenced the participants’ sense of belongingness and authenticity and aligned well with the combinatory view, thereby enabling

the examination of how micro-level processes, such as a sense of belongingness and authenticity, contribute to macro-level outcomes of inclusion within the strategy process.

5.2.2. Theoretical Background

The concept of open strategy, as defined in the literature, serves as a foundation for understanding how organizations can enhance participant inclusion and leverage the interplay between inclusion and transparency to drive successful strategy initiatives. Open strategy involves two crucial aspects: inclusiveness (referring to the range of individuals involved in strategy-making) and transparency (both in formulating strategies and communicating them) (Whittington et al., 2011). The interconnection of these elements provides a comprehensive framework for organizations to navigate the complexities of modern strategy development.

Open strategy has demonstrated several advantages, including greater access to information and knowledge (Amrollahi & Rowlands, 2017; Malhotra et al., 2017; Regnér, 2003), facilitating implementation (Denyer et al., 2011; Stieger et al., 2012), increasing legitimacy (Gegenhuber & Dobusch, 2017; Mantere & Vaara, 2008; Morton et al., 2018b; Yakis-Douglas et al., 2017), bearing powers of innovation and challenging business as usual (Bjelland & Wood, 2008; Schmitt, 2010) and the identification of strategy talents (Whittington, 2019).

Nevertheless, confusion has arisen in the literature due to the interchangeability of the terms ‘participation’ and ‘inclusion’ (Mack & Szulanski, 2017). A more nuanced perspective suggests that organizations should manage engagement through participatory and inclusive approaches, thereby differentiating between stakeholders’ input for decisions (participation) and creating a community of interacting stakeholders engaged in ongoing strategic issues (inclusion)

(Quick & Feldman, 2011; Mack & Szulanski, 2017, p. 386). This differentiation offers a crucial lens through which to address the challenges and dilemmas emerging from open strategy, thereby enabling organizations to shape their approach to foster higher inclusion.

However, achieving the full potential of open strategy is not without challenges. These challenges encompass greater transparency (Appleyard & Chesbrough, 2017; Mack & Szulanski, 2017), stakeholder pressure, the complexity of open strategy processes (Malhotra et al., 2017) and stakeholder commitment (Seidl & Werle, 2018; Stieger et al., 2012). Despite its advantages, open strategy encounters challenges that cannot be addressed solely through the dichotomy of participation and inclusion (Mack & Szulanski, 2017). Instead, organizations must navigate these complexities by simultaneously fostering a sense of inclusion amongst participants while also acknowledging the necessity for complementary forms of closure (Dobusch et al., 2019). This underscores the need for a broader perspective on inclusion.

The multifaceted nature of inclusion is pivotal in bridging the gap between participation and exclusion. The concept of inclusion introduces multidimensional nuances. Inclusion involves the perception of being an esteemed member of a work group through experiences that satisfy the needs for belongingness and uniqueness (Shore et al., 2011). Belongingness signifies robust interpersonal relationships, while uniqueness preserves a distinctive sense of self (Shore et al., 2011). This understanding emphasizes the need to balance both elements for fostering inclusion, thereby acknowledging the importance of retaining individuality while also feeling part of a group (Chung et al., 2020; Randel et al., 2018).

Inclusive leadership, focused on facilitating belongingness and uniqueness while contributing to group processes and outcomes, becomes pivotal in ensuring individuals' perceptions of inclusion within work groups (Randel et al., 2018). Randel et al. (2018, p. 191)

revealed that experiencing inclusion in work groups is dependent on effective leadership. They define inclusive leadership as ‘a set of leader behaviors that are focused on facilitating group members feeling part of the group (belongingness) and retaining their sense of individuality (uniqueness) while contributing to group processes and outcomes’. This is in line with the process of inclusion, where it is the group that includes the individual rather than the individual who connects to the group.

Thus, the definitions of belongingness and uniqueness are refined through the concepts of relatedness (the desire to feel connected to others; Deci & Ryan, 2000) and autonomy (the desire to experience choice and the wish to behave in accordance with one’s integrated sense of self; Deci & Ryan, 2000). Autonomy has also been labelled authenticity (Bettencourt et al., 2006) and defined as ‘the extent to which a group member perceives that he or she is allowed and encouraged by the group to remain true to oneself’. Furthermore, the concept of authenticity, as an extension of autonomy, enables group members to be true to themselves while promoting both similarity and difference (Bettencourt et al., 2006). This broader definition of inclusion encompasses atypical (minority) and prototypical (majority) members, thereby creating an environment where individuals can fully express their authenticity (Jansen et al., 2014). Jansen et al. (2014, p. 373) define inclusion as ‘the degree to which an individual perceives that the group provides him or her with a sense of belonging (group membership and group affection) and authenticity (room for authenticity and value in authenticity)’.

Embracing this comprehensive view of inclusion – one that embraces belongingness and authenticity (Shore et al. 2011) – offers a powerful lens through which to address the research question. By recognizing that inclusion goes beyond mere participation and requires a balance of belongingness and authenticity, organizations might be able to effectively navigate the

challenges posed by open strategy. This approach enables organizations to harness the synergies between inclusion and transparency, thereby driving the success of their strategic initiatives. In essence, organizations foster an environment where diverse voices are appreciated and integrated, thereby leading to a dynamic and inclusive strategic landscape.

5.2.3. Methods

Building upon a recent call for bringing strategy process and strategy practice together, this article inscribes itself within the line of the ‘Strategy as Process and Practice’ approach, adopting ‘a combinatory view, in which the strategy process and practice traditions are not in complementary or critical relationships, but rather can be synthesized into a single, coherent body of research’. (Burgelman et al., 2018, p. 541). The aim of the combinatory view is to allow for micro-level processes and practices to be linked with macro-level outcomes. In linking micro and macro, this article adopts a hybrid strategy, combining progression and instantiation, considering ‘different practices over successive periods’ and analyzing ‘how they instantiate emerging outcomes over time’ (Kouamé & Langley, 2018, p. 576).

A qualitative inductive research approach was selected for the purpose of this study so that the exploratory character of the research could be preserved. In accordance with Merriam's (1998) interpretation and definition, this article is based on a single longitudinal case study. It also utilizes Yin's (2018) technique, which emphasizes the fundamental rigor in the design of the case study prior to the data collection to generate a clear roadmap. In addition to agreeing with Stake's (1995) viewpoint that it is impossible to plan everything in advance, the flexible approach advocated by Stake (1995), which allows for the design to be modified even after the

initial phase of data collection has begun, was also adopted. In addition, according to Langley (1999), conducting a single case study is the most efficient method for acquiring a comprehensive understanding of a particular action – in this case, how the organization’s practices and processes influence the participants’ sense of belongingness and authenticity .

An increasing number of studies have employed case studies as a method to understand organizations’ strategies in practice. A recent article, in line with Whittington (1996), also revealed that case studies are a “suitable method to perform an in-depth analysis of phenomena when it concerns the perspective of strategy as practice, once it looks at the case in its singularity and so does the strategy as a social practice process” (Bellucci & Lavarda, 2018, p. 1). Moreover, Flyvbjerg (2006, p. 242) stated that ‘a scientific discipline without a large number of thoroughly executed case studies is a discipline without systematic production of exemplars, and a discipline without exemplars is an ineffective one’.

A) Research Setting.

HomeCo (anonymized name), a multinational active in the home improving and do-it-yourself (DIY) sectors, is the focus of this case study. HomeCo assures that by operating on a platform model, all its constituents may develop in tandem with the ecosystem as a whole without sacrificing agility or responsiveness. In recent years, HomeCo has developed a new leadership model based on authenticity, openness, impact and interdependency and brought together over 150,000 employees from around the world in order to address the worldwide issue of sustainability within its organization. HomeCo was also an early adopter of participatory management, giving employees a say in shaping the company’s future through group consensus.

HomeCo's strategic project began in 2019 and aimed to co-create a new strategic turn for HomeCo by developing and incorporating Corporate Social Responsibility (CSR) into the company's corporate strategy and disseminating it throughout the firm's (Business Units) BUs. Extensive stakeholder participation, a group-wide series of sense-making workshops and subsequent implementation were used to achieve this. Consequently, the case study concentrated on this project, its method and the people who participated in it. This case study is particularly interesting, as it shows how external elements have impacted the initial strategic process and pushed the organization towards more openness. Evolving from a closed approach to involving the 150,000 employees of the organization worldwide, this case study reveals that inclusion is possible under certain conditions and structures without running into all the challenges posed by open strategy.

B) Data Collection.

Employing a grounded theory approach (A. Bryant & Charmaz, 2011; Glaser et al., 1968), the theorizing herein was developed over time from observations of facts and interpretations with the aid of the prior research on theoretical notions to eliminate biases. The data was examined, coded and interpreted while it was being collected. The data was collected from different sources and combined in real-time and retrospective data collection (Pettigrew, 1990) to ensure the veracity and dependability of the data collected, which included participant observation, the collection of workshop artefacts such as PowerPoints, a card game, a documentary and interviews with a number of different people involved in the organization ([Table 7](#)). By bringing

together disparate pieces of information, a fuller picture of the situation was painted and triangulation became possible.

Table 7

Data Collected: Source, Type, and Duration

Data source	Description	Type	Amount/Length
Semi-structured interviews	These interviews were conducted within various business units of the company and consist of people in the organising team, those who actively participated in the crafting and facilitation of the appropriation workshops and middle managers and lower-level employees who have facilitated, participated in a workshop and/or actively implemented the strategy in their day-to-day actions.	Audio recordings, written transcripts and written notes	50 interviews >33.5 hours (Min: 14 minutes; Max: 84 minutes)
Documents	‘Connector kits’ (PowerPoints, notes and guidebooks – Word documents – to facilitate a workshop), PowerPoints presenting the card game and the strategy.	Written documents, PowerPoint presentations and meeting minutes	13 items
Observations	Observation of appropriation workshops. Participated in two workshops and observed how the workshops were held and organised and what material elements are used.	Pictures, written notes	6 hours
Artefacts	The documentary, the card game, the connector’s kit, the implementation platform.	Word documents, PowerPoints, screenshots/pictures and videos	5 items
Secondary data	Documentation of workshops through third-party collected pictures and surveys, informal discussions that took place with participants outside of a formally programmed interviews, screenshots of websites dedicated to the presentation of the strategy, screenshots of internal social media posts.	Survey results, screenshots/pictures and written notes	91 items

The data was collected over an almost two-year period (May 2021–January 2023) yielding a comprehensive processual data set (Langley, 1999). The data collection aimed to investigate the complete strategizing process, which included the ideation, formulation, and implementation phases of a strategic plan (although the implementation phase is still ongoing and, thus, has not been investigated in its entirety). The uniqueness of the process encouraged a deeper

investigation into the element of inclusion while perusing the data collection and utilizing an iterative-inductive approach of collecting and analyzing data (Orton, 1997).

C) Data Analysis.

The data analysis was guided by the previously developed theoretical constructs in order to determine the sense of belonging and authenticity of the participants in open strategy processes. NVIVO was used for coding the data and analyzing it in iterative cycles throughout the data collection to adjust the data collection if needed (Stake, 1995). The data analysis was built around various steps. First, the various documents and artefacts that were used during the process were chronologically classified to start reconstructing the process. From this, and through the preliminary interviews that were conducted, it was possible to reconstitute the timeline of HomeCo's strategic process (Figure 9) and the various elements that were part of the overall process, setting them within their chronological order (Langley, 1999), namely: (1) stakeholder listening, (2) strategy formulation through various workshops, (3) organization of the deployment strategy, (4) training connectors and producing the strategy toolkit, (5) facilitating the appropriation workshops and (6) implementing the strategy. The processes for developing strategies over the long term may employ a variety of practices or even repeat the same practices several times (in this case, for example, the international conventions). Although 'strategic planning' can be thought of as a practice, different kinds of events can compose a process within the practice (e.g., stakeholder listening, strategy writing and appropriation workshops) (Kouamé & Langley, 2018).

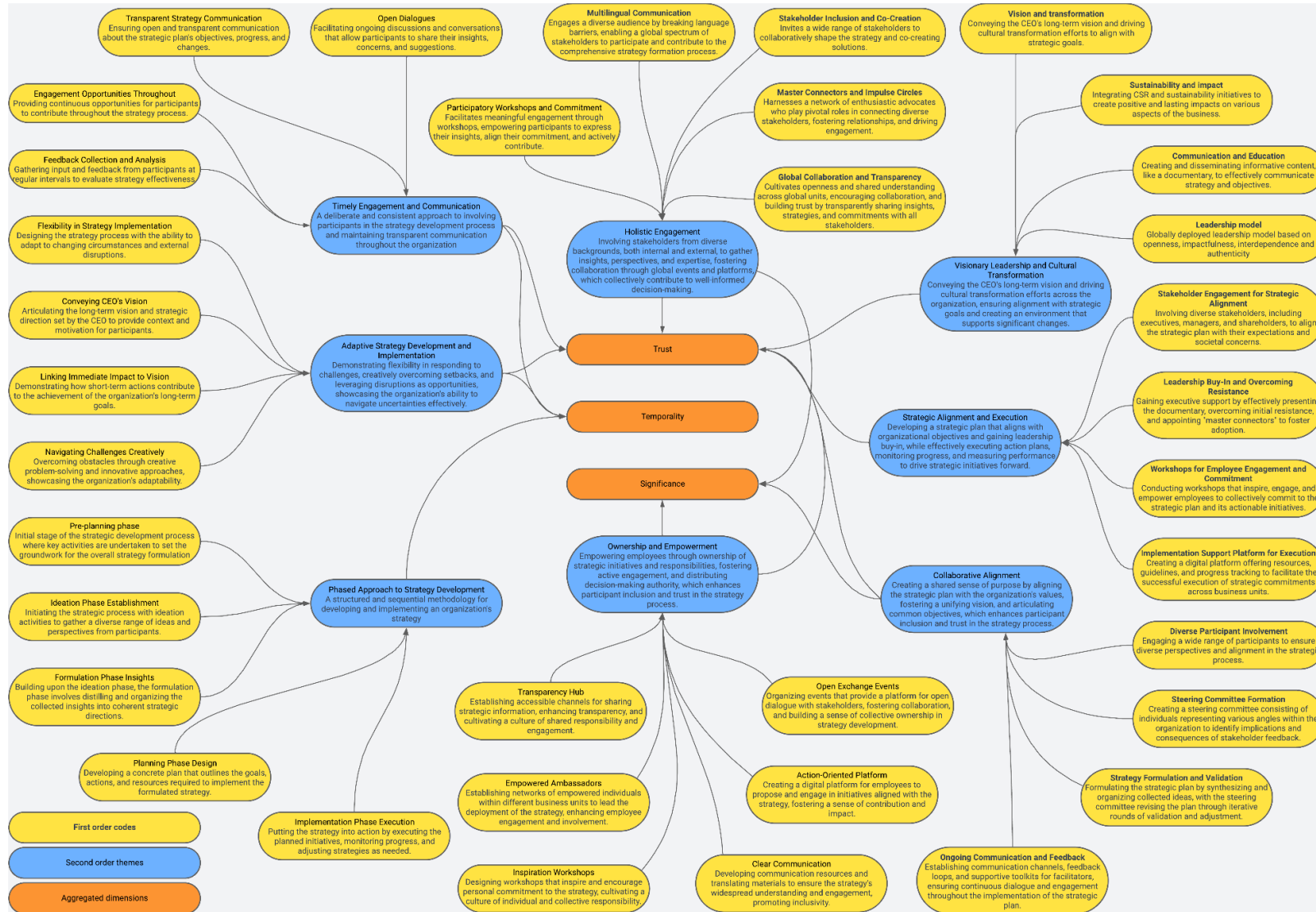
Following the “outcome-driven narrative” method (Kouamé & Langley, 2018, p. 569), this study aimed to explain how a certain outcome (in this case, participant inclusion in the process) evolved by relying on the evidence and sources of explanation at the micro-level using retrospective data and interviews. This study investigated distinct practices across successive periods and evaluated how they instantiate emergent outcomes through time by integrating progression (“showing progressive and/or mutual influence between micro and macro over time”) and instantiation (“showing how microprocesses accomplish macro outcomes”) (Kouamé & Langley, 2018, p. 565), expanding theorization of the micro-macro relationship in strategy-as-practice research. This research is intriguing, as it demonstrates how the strategic plan originates as a result of multiple ‘zones of inclusion’ across many time periods and how it is then re-contextualized and changed after its initial formulation.

The interviews were open-coded to condense the information necessary for making sense of the interview transcript and to better understand what practices were used during this process and how they led to participant inclusion within an open strategy approach. Working through the data, the newly created codes were classified into numerous categories (first-order codes) and recurring themes, such as open dialogues, empowered ambassadors, diverse participant involvement and vision and transformation (

Figure 8 **Error! Not a valid bookmark self-reference.**). Following several readings and the coding of the data, the first-order codes were turned into second-order themes, thereby yielding a better theoretical understanding of the data and building up to the themes of holistic engagement, ownership and empowerment or timely engagement and communication. As a last stage in the process of building a grounded understanding of the issue, the analysis indicated that trust, significance, and temporality (aggregated dimensions) are three aspects that support inclusion in open strategy processes.

Figure 8

Coding Levels

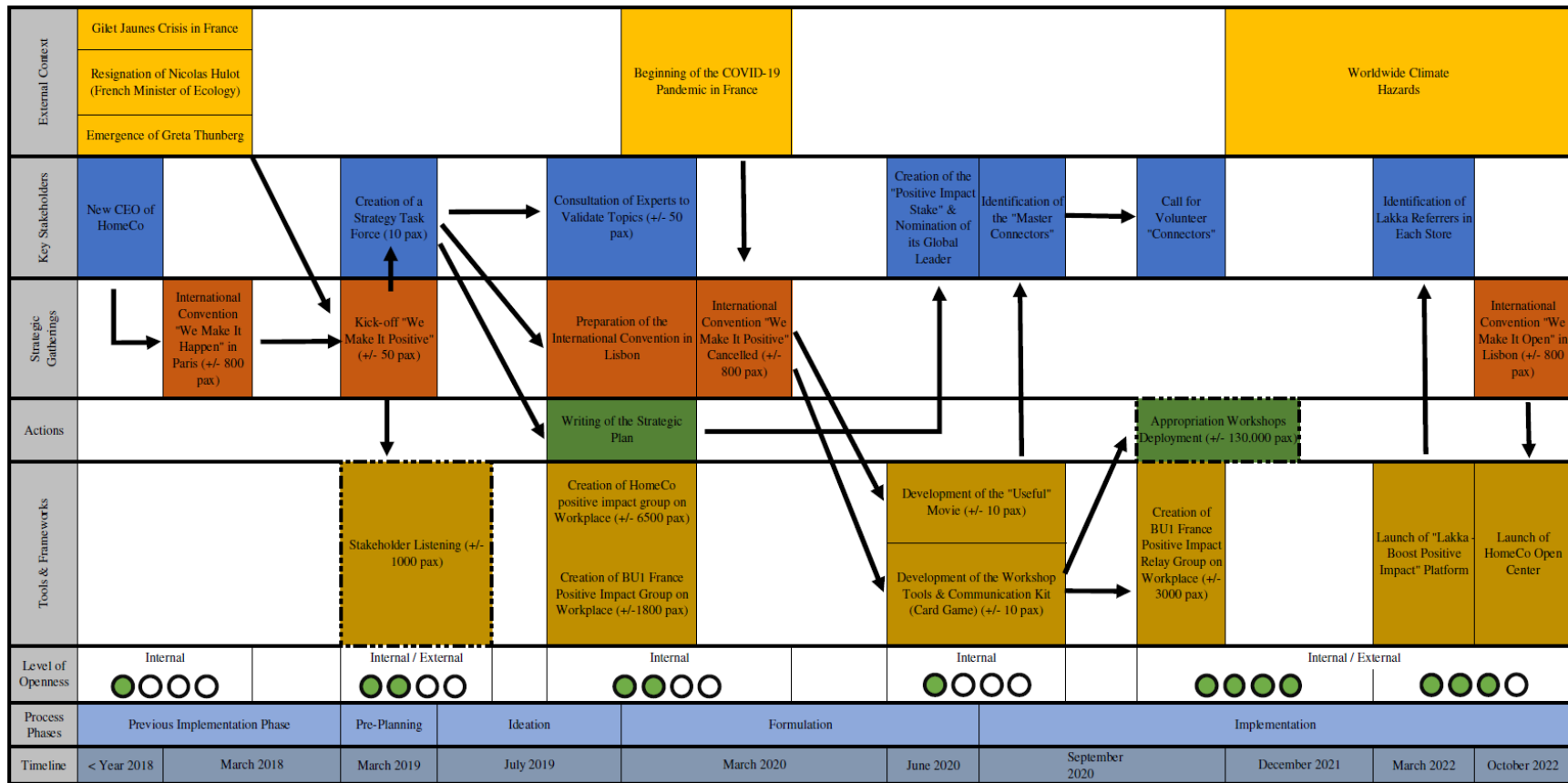


5.2.4. Findings

The findings can be broken down into four time periods. The first (March 2019–July 2019) provides details regarding how the process of strategic renewal was launched and how the ideation phase was constructed and conducted. The second relates to the formulation phase (July 2019–March 2020) and provides insights into how the strategic plan was constructed and who was involved. The third period (March 2020–December 2021) describes the planning and initial implementation phase when, due to the COVID-19 pandemic, the organization had to rethink its means of delivering the new strategic plan to its stakeholders. Finally, the last period (December 2021–October 2022) covers the ongoing implementation phase, diving deeper within the tools and frameworks developed for this specific phase. The overall process is represented in [Figure 9](#), which depicts the various time periods, the activities that were ongoing at those times and how many people were involved. The level of openness is represented as an indicator of how open the process was, based on the interpretation of the data collected and the interviewee’s input. The arrows indicate the causal links amongst the elements.

Figure 9

Process Timeline



A) First period: March 2019–July 2019—Pre-Planning and Ideation.

a) March 2019: Kick-Off.

HomeCo launched its strategic process with a two-day event facilitated by the CEO and internal facilitators. For this event, they imposed the diversity of the participants, mixing the general directors, the members of executive committees, a variety of people representing the different jobs in the company, the store managers, human resources, and the representative of the shareholders. The event gathered roughly 40 people in a face-to-face setting; the event was open to other participants online. The objective of this event was for the people who were present to familiarize themselves with the corporate social responsibility (CSR) pledges of the company and its business model. There was a willingness to develop a pedagogy around the vocabulary used in this subject.

A steering committee was created at the end of this event to develop a strategic plan. Ten people were part of the steering committee (one global leader CSR, one CSR leader, one HR leader, one BU general manager, two internal experts [social and environmental], one spokesperson representing those who attended the kick-off and was elected that day, one leader on product issues, one external consultant and one facilitator) and were selected because they were a holistic representation of the organization.

From this event, a phase of stakeholder consultation was initiated with the willingness to co-construct an inclusive process around the subject of CSR. The objective was to collect the ideas and opinions of the company's stakeholders regarding the CSR positioning of HomeCo within one month. To achieve this, the general directors and store managers nominated two to three stakeholders from within their contact list. They were at liberty to nominate whomever they

believed was fit for the task of answering the questions regarding HomeCo's CSR positioning; together with the group in charge of the process, they validated the questions that would be submitted to their stakeholders.

After one week, the objective was overachieved; over 4,500 answers were gathered from various stakeholders at an international level. These answers were analyzed with a software that delineated the main subjects for which the stakeholders had expectations regarding the company. Ten main subjects were identified, amongst which four clearly stood out: (1) waste management, (2) raw materials, (3) the environment and (4) employment. The steering committee used this material to identify and organize all the ideas that were collected and to discover what the implications and consequences were for each idea. The committee made two rounds of revision to the strategic plan.

b) July 2019: Presentation of the Strategic Plan.

In July 2019, the steering committee presented its recommendations and the strategic plan to the executive board composed of the nine global leaders. The board could not come to a decision and refused the proposition. 'They were not ready. They needed more data, more reflection on the topic at hand and more support from the general managers' ([INT45](#)). However, paradoxically, there was an individual acceptance in the singular domain that something had and could be done; it was rather the combination of all the domains forming one global strategy that was difficult to achieve.

Interpretation. The kick-off event in March 2019 symbolized a deliberate and consistent effort to involve the participants in strategy development. The event's diverse composition,

accommodating both physical and online participation, exemplified a commitment to inclusivity and transparency. The stakeholder consultation phase showcased the organization's holistic engagement strategy. The involvement of diverse stakeholders, both internal and external, contributed to a comprehensive collection of insights and perspectives. Collaborative events and platforms foster well-informed decision-making. The CEO's engagement at the kick-off event demonstrated visionary leadership aligned with the organization's strategic goals. The stakeholder consultation and the steering committee's efforts reflected a cultural transformation fostering inclusivity and participatory decision-making. In addition, the organization's response to the challenges underscores its ability to creatively overcome obstacles and view disruptions as opportunities. The iterative process of the steering committee's revisions emphasized flexibility and adaptability to navigate uncertainties effectively. The alignment of the strategic plan with the organizational values and gaining leadership buy-in during the presentation were crucial elements for the successful execution of the strategic initiatives. The strategy development followed a structured and sequential methodology from the kick-off event to the strategic plan presentation. This ensured a coherent and comprehensive journey that mirrored the temporal progression. The inclusion of internal experts, business unit managers and external consultants in the steering committee highlights the distributed decision-making authority. In addition, empowerment fostered active engagement and trust amongst the participants, contributing to success. The alignment of the strategic plan with organizational values and common objectives fostered a shared vision. Collaborative alignment enhanced participant inclusion by ensuring resonance with the organization's direction.

B) Second period: July 2019–March 2020—Strategy Formulation.

a) August 2019: Annual Meeting of the General Directors and Store Managers.

At this point in time, the CEO decided that the general directors and the store managers needed to adopt the process that was set in motion. This was a turning point in the process. The CEO wanted to show and convince the audience that their companies and stores have a role to play in climate change and CSR subjects. During this event, five CSR leaders from the company were invited to speak in front of the audience and they talked from their hearts and their own convictions on the subject – not on their experience as CSR leaders but through their own personal experience. From this moment on, the steering committee was free to continue to work on the strategic plan.

b) September–December 2019: Closed Room Work.

Only four people (one facilitator, one HR leader, two experts – social and environmental) from the initially formed steering committee continued to pilot the formulation of the strategic plan on a daily basis during this time. Though the discussions during the formulation phase were held within a small working group, it remained open to those who had questions and wanted to contribute. In early December, the working group found the binding element that would make everything more embedded and avoid to present something that is off-ground, there was a need for it to take root. They presented the first version of their work to the shareholders. The presentation ended with a standing ovation and complimentary comments and feedback on what was presented.

c) January 2020–March 2020: Willingness to Organize a Convention.

The idea was to organize a convention in March 2020 and invite over 700 people from the company and the wider ecosystem to present the strategic plan. At that time, the event was cancelled because of the restrictions of the pandemic. The working group did not understand that they would not be able to organize the event for a couple of weeks later (because of the worsening pandemic) and were subsequently confronted with the economic reality of stores closing. Thus, the context was no longer appropriate to organize such a big event. However, they felt they had to act immediately, otherwise the enthusiasm and dynamics surrounding the project would fade away. Therefore, they decided to reuse material that had already been shot during previous years in the organization combined with interviews recorded at that time to produce a documentary to pitch their new strategic plan.

Interpretation. The CEO's decision to engage the general directors and store managers marks a pivotal turning point emphasizing the CEO's commitment to the open strategy process. By inviting five CSR leaders to share personal stories and convictions on climate change and CSR, the CEO fostered a connection between the strategic plan and the personal experiences of the participants. This exemplifies both visionary leadership and cultural transformation, conveying a long-term vision while creating an environment where individuals could relate personally to the subject matter. Closed room work epitomized adaptive strategy development and implementation, as a small group diligently refined the strategic plan. This process showcased flexibility, as the team creatively honed the plan while responding to dynamic challenges. Simultaneously, the phased approach to strategy development was evident as the working group meticulously constructed a coherent and comprehensive plan in preparation for future presentations. The steering committee's dedication to their task exemplified the

empowerment of employees through their ownership of the strategic initiatives. Further, the plan's initial presentation to shareholders garnered an enthusiastic response, signifying a shared sense of purpose and collaborative alignment. The organization's willingness to coordinate a convention demonstrates timely engagement and communication, as well as holistic engagement. Despite the event's eventual cancellation due to the pandemic, the decision-making process was consistent with the holistic approach of involving a wide range of stakeholders. The adaptive strategy development theme emerged again, as the working group adapted to the changing context by repurposing existing material to create a documentary that articulated the strategic plan.

C) Third Period: March 2020–December 2021—Planning and Deployment of the Strategic Plan and Beginning of the Implementation Phase.

a) May 2020: Developing the Documentary and Workshop.

With an emphasis on testimonials from real life experiences, facts and proof of what the organization had already accomplished, the documentary USEFUL was conceived as an illustrated documentary (words, videos and important figures). It laid out the obstacles the organization must overcome and the promises it must make in order to identify answers and implement effective, all-encompassing measures that take into account economic, human, and environmental factors. It was meant to help everyone from employees to mayors, suppliers, clients, shareholders and other stakeholders to grasp the company's long-term goals. The documentary was shot in May 2020. It also featured the diversity of the various BUs,

representing the different countries and brands and ensuring gender parity. The objective was for people to understand and adopt the new strategy.

The documentary presents 24 commitments formulated from the 4,000 verbatims. Amongst these commitments, 12 were mandatory (e.g. gender equality, listening to employees, carbon statement) and 12 were contributory commitments (e.g. pedagogy regarding responsible consumption). The workshops were built around three steps: (1) inspiration, (2) appropriation and (3) commitment. In these three steps, the notion of ‘together’ is important.

How do we get inspired together, how do we appropriate and make sense together and finally how do we commit together and on what? The objective of this workshop is to decide to what they commit as a brand, in their store in their department. [INT 45](#)

The working group put in place several guidelines to ensure that the message was spread throughout the company: (1) the documentary had to be shown during collective meetings, (2) it had to be seen during working hours, (3) a communication kit was provided to those organizing the viewing, which had to be thoroughly respected but could be adapted to local context and (4) feedback regarding the viewing had to be collected and submitted through a Google form in order to see which subjects were the most engaging. The idea of a workshop emerged from within the framework of the five concepts described above to distribute the documentary. Over 70,000 employees have attended the three-hour workshops by September 2020 and over 110,000 by June 2021.

There was an introductory phase designed to make everyone comfortable with one another, the viewing of the documentary, a card game created exclusively for the workshop, a

time for sharing feelings and a time for selecting which of the 24 commitments participants wanted to take action on.

All these processes were conducted in all of the organization's native languages, both in-person and via video conferencing, as we were still working under the COVID-19 framework. The workshop attendees were encouraged to re-articulate, re-manipulate and recover their sense of self by repeatedly reading cards, sketching HomeCo houses and answering questions such as 'As an individual, what are the commitments that make you vibrate?' and 'To what ends do you desire to contribute your time and energy to the group in which you currently find yourself?' After taking one more group picture, the organizer of the session provided a summary of what was covered.

The training was informative and helped bring together a diverse group of individuals. The aim was to provide each employee with the opportunity to continue writing the story and to select the topics that made the most sense wherever they were to activate, execute and multiply them. The supplied plan offered a basic framework, with the exception of the commitments' distinctiveness, which is more of a requirement for all the BUs. Each worker was given the tools they needed to take this action throughout this procedure and session.

b) July 2020: First Screening of the Documentary by the Executive Committee.

The executive committee that refused the first proposal in July 2019 were the first to see the documentary and welcomed it enthusiastically. Afterwards, it was decided to create 'impulse circles'. The idea behind the impulse circles is that one person in each business unit takes on the role of 'master connector' to deploy the workshop.

c) September 2020: Appropriation Workshop Deployment.

Throughout the planning process, the working group indicated a number of individuals and planned to rely on some of these relationships as well as the network of CSR executives in their BUs. The general ambassadors were designated as ‘master connectors’. There were 30 master connectors in total and they were selected by the general managers of each BU after viewing the documentary for the first time. When selecting the master connectors, the level of subject sensitivity of the individuals was taken into account. These individuals were then given the keys to the workshop toolset and given the following instructions, ‘It is now your responsibility to identify and coordinate using all the tools we’ve demonstrated. Plan the distribution of this information between September and June so that the entire staff can accompany you on this expedition’. The master connector’s responsibility was to identify and train the workshop facilitators to disseminate the documentary’s vision throughout the business unit. These master connectors then designated several connectors within their respective business divisions to receive a comparatively privileged position as a transmitter, spokesperson, or facilitator of the company’s strategy. As in the past, the CEOs, top 1,000, department leaders, etc. were to perform the roles that they would have in a classic case. This time, the role was filled by a connector, who was occasionally a store manager or a particularly motivated lower-level employee. One BU’s strategy consisted of calling each store and recruiting one or two individuals to form a network of connectors; as a result, individuals emerged from concealment—those with an interest in these topics, whether or not they had previously expressed it. The result was the formation of a group of several hundred volunteer employees who assisted with the distribution, creation, and dissemination of these workshops.

The working group developed a communication kit to accompany those facilitating the workshop and translated the documentary and workshop materials in 12 different languages for the adoption to be as widely spread as possible. The viewing of the documentary was done either 100% digitally or 100% face-to-face, depending on the pandemic restrictions. A few BUs and connectors decided to adapt it to their local context. By September 2020, 70,000 employees had followed the three-hour sessions and the numbers reached 110,000 by June 2021. The official deployment period ended in December 2021. The context during which this process was developed and launched was particular (COVID) and helped to create interest and excitement around the process, accentuating the commitment and investment of the participants, as the conscience of individuals regarding the sanitary conditions and environmental and social issues was heightened.

The objective was then to measure the impact of the process. The framework was now set and the general directors embedded the strategy within their BUs; it was no longer something that had been thrust on them by corporate. The appropriation phase engendered a positive reception and an ‘I can do it’ reaction. The type of business (habitat) also made a tangible difference. The communication process was and is being reinforced, internally and externally. The positive impact pledges team (created during the process with the appointment of a global leader of positive impact) was in charge of follow-up on the KPIs (Key Performance Indicators). Each business unit now worked on the strategies locally and all the actions were locally adapted and deployed.

Interpretation. The documentary was conceived as an illustrated, bringing together real-life testimonials, data and evidence of the organization’s achievements. This multimedia approach mirrors the organization’s commitment to engaging stakeholders from diverse

backgrounds and creating a collective understanding of the long-term goals. By weaving personal narratives and showcasing diversity, the CEO communicated a transformative vision to the general directors and store managers. This visionary approach, demonstrated through the documentary's creation, sought to inspire a cultural shift by aligning individual convictions with the organization's strategic objectives. The decision to transform the documentary into a series of workshops showcased the organization's flexibility. Despite the pandemic's impact on events, the organization adapts and conducts workshops, thereby ensuring its continued engagement and communication with employees. This illustrates the organization's ability to creatively overcome setbacks and navigate uncertainties, a hallmark of adaptive strategy development. The three-step workshop structure—inspiration, appropriation, and commitment—aligns with the sequential methodology of phased strategy development. The workshops enable participants to collectively align their commitments with the organization's values and objectives, thereby fostering a shared sense of purpose and enhancing the participant inclusion. The designation of connectors within the BUs mirrors the theme's emphasis on empowering employees through the ownership of strategic initiatives. These connectors are empowered to facilitate the workshops, thereby ensuring that the strategic plan becomes a collective effort with active engagement from the various levels of the organization. By translating the materials into 12 different languages and allowing flexibility in the format (digital or face-to-face), the organization fosters a shared sense of purpose and alignment across diverse settings. In this case study, the approach was unconventional, as there was no official communication regarding the process, its intentions, who was to be involved or what the steps were going to be. However, this did not diminish the sense of belonging and authenticity, as the process was subsequently fully explained to the

participants during the workshop. Overall, the participants found that the process was open and collaborative and felt a sense of belonging within the organization and the strategic process.

D) Fourth period: December 2021–October 2022: Ongoing Implementation Phase.

a) December 2021: End of the Appropriation Workshop Deployment and Development of the Implementation Support Platform.

In order to put the strategic plan into action, the first step to be taken was to raise awareness. The second step was to act. Both the video and the workshop did an excellent job of increasing people's awareness of the issue and enabling them to commit to implementing the approach. However, the issue regarding how to motivate workers to behave in the appropriate manner remained unresolved, particularly in the realm of CSR, where one might easily waste time on activities that have little to no effect.

In this time period, the various BUs continued to integrate the corporate strategy within their own strategic plans. In order to support the implementation phase, one of the BUs developed a digital platform to guide the actions that should be taken in partnership with an external startup. The positive impact strategy of the organization is the only activity that will ever be incorporated into the platform, which is organized around five pillars of commitment. To this day, there are 90 activities that have been referenced on the platform. These actions were selected based on what was being done in the field and which actions were successful or on what was determined to be a priority by the business referents at the national level, who subsequently produced the operational procedures. However, the staff also have the ability to offer proposals for additional tasks that may be performed on the platform; 170 suggestions have been made,

already. The card also includes information regarding the implementation steps (budget, time, space, etc.), which stores have already done it and a link to the contact person who is the business referent on that particular action for any specific questions (questions and answers are then displayed on the action card page to create a ‘frequently asked questions’ section). Following the debut of the platform eight months later, the stores had already logged 3,500 activities.

b) October 2022: New International Convention in Lisbon.

A year after the implementation phase was launched, it was time to take stock of how the new strategy had been deployed. A new International Convention was thus organized in Lisbon. This convention was called ‘We Make it Open’. The objective of this convention was to create an open space with stakeholders with the aim of building a world platform for a positive habitat. On this occasion, the CEO also reaffirmed his vision for the organization and presented the various pillars for the future. What specifically marked this convention was the launch of the HomeCo open center that allowed all the employees worldwide to access information regarding the company’s strategy in a totally transparent and accessible manner.

Interpretation. The development of the digital platform to guide the implementation support reflects a consistent approach to involving participants in the strategy execution process and ensuring transparent communication regarding the actions to be taken. The implementation support platform, organized around five pillars of commitment and referencing various activities, demonstrates the involvement of stakeholders from diverse backgrounds in shaping the execution of the strategy. The platform’s ability to receive suggestions for additional tasks

further fosters collaboration and insights from various sources and reinforces their ownership of the strategic initiatives and responsibilities, fostering active engagement throughout the organization. The platform provides information regarding the company's strategy, budget, timelines, and contact persons, ensuring that the employees are well-informed and aligned with the organizational objectives while executing their tasks. The development of the implementation support platform and the subsequent International Convention in Lisbon aligned with the CEO's long-term vision for the organization. The launch of HomeCo's open center further exemplifies the cultural transformation efforts, creating an environment that supports transparency and accessibility. A phased approach to strategy development is illustrated in the staged deployment of the strategy – from raising awareness through the documentary and workshop to enabling the employees to take action through the implementation support platform. The structured approach ensures that the employees move through different phases, from understanding the strategy's vision to actively participating in its execution. Collaborative Alignment was highlighted through the International Convention in Lisbon, where the organization created an open space for stakeholders to collaborate on building the world platform for a positive habitat. The convention's theme, "We Make it Open," aligns with the collaborative alignment theme, fostering a shared sense of purpose and unifying the vision amongst the participants.

B) Conceptual Interpretation.

a) Trust in Collaboration, Cohesion, and Empowerment.

In the context of this case study, the aggregated dimension of 'trust' plays a pivotal role in enhancing participant inclusion in the open strategy processes and pertains to the

establishment and cultivation of confidence, reliability, and credibility amongst the stakeholders throughout the process. It emerges as a cornerstone that permeates the various aspects of collaboration, cohesion, and empowerment within the organization.

As the strategic plan was co-created, trust was established through transparent communication, genuine engagement, and consistent actions. This trust extended beyond internal boundaries, encompassing the employees, executives, shareholders, and external partners. It thrived on the organization's commitment to openly sharing information, demonstrating accountability, and aligning actions with the communicated strategies. As this circle of trust widened, the stakeholders became assured of the organization's intentions, decisions, and actions, even in the face of challenges and uncertainties. Ultimately, trust formed the bedrock for effective execution and the harmonious alignment of the organizational objectives.

Trust serves as the catalyst for encouraging individuals to step out of their comfort zones and explore uncharted territories. This trust empowers employees to take calculated risks, delve into novel ideas and challenge the conventional norms. Organizations that cultivate trust are inclined to provide autonomy and flexibility to their team members and recognize their reliability in making independent decisions. This atmosphere of trust encourages individuals to contribute innovative solutions, as they know their ideas will be valued and supported.

Trust takes center stage in creating a nurturing and inclusive environment. When individuals trust that they will be treated fairly and that their contributions will be acknowledged, they are more likely to be fully engaged and take ownership of their work. Trust empowers employees to leverage their strengths, embrace their responsibilities and actively contribute to the organization's triumphs. As this culture of trust permeates, individuals are emboldened to

step forward, take initiative and make a positive impact, thereby collectively driving the success of the organization.

In the intricate tapestry of collaboration, cohesion and empowerment, trust forms the connecting thread that binds stakeholders together. Whether in the open strategy process, innovative endeavors or efforts toward equity and empowerment, trust acts as the linchpin that enables the organization to thrive, adapt and flourish in an ever-evolving landscape.

b) Significance in Individual Empowerment and Collective Endeavors.

The aggregated dimension of significance converges on both individual empowerment and collective endeavors, thereby illuminating the intrinsic value and meaningful impact that participants garner from their engagement in open strategy processes.

In a nuanced exploration of significance, the focus shifts to the individual level. Here, significance embodies the sense of personal value, importance, and profound meaning that participants extract from their active involvement in open strategy processes. This perception goes beyond mere recognition; it encapsulates the belief that their insights, contributions and perspectives hold weight and play a pivotal role in shaping strategic initiatives. The dimension of significance underscores how genuine inclusion, transparent communication and active participant engagement cultivate a profound connection to the organization. This connection, in turn, nurtures a heightened sense of purpose and belonging, thereby fostering a collective drive towards making a tangible difference. Ultimately, this dimension captures the intricate interplay among participant inclusion, transparency, and engagement; this culminates in an individual's

profound understanding that their contributions are instrumental in steering the organization's strategic success.

Embedded within collaboration and cohesion, significance takes root as individuals become part of a team where their unique contributions are valued and their skills are celebrated. The collaborative environment amplifies the perception of individual contributions as vital components of collective achievement. The significance of one's work expands beyond the individual efforts, assuming a pivotal role in the broader tapestry of group success. This interconnectedness of individual significance and the collective whole magnifies the importance of collaboration while simultaneously accentuating how each individual's role contributes to the overarching objectives.

The context of independent innovation intertwines significance with the autonomy to innovate and contribute in meaningful ways. Here, individuals harness the opportunity to create a lasting impact through their ideas and solutions. This creative autonomy empowers individuals to explore uncharted territories and effect transformative change within the organization or even the industry. The significance derived from independent innovation lies in the ability to bring about positive change and inspire evolution, thereby signifying how individual ingenuity can be a driving force for organizational progress.

Empowerment translates into individuals having equal access to opportunities, thereby amplifying their sense of personal value and contribution. The empowerment process provides individuals with platforms to make meaningful impacts, thereby fostering personal growth and amplifying their voices. This significance is rooted in the assurance that every individual's perspectives, ideas, and endeavors are valued and can contribute to the collective betterment.

In the intricate dance between individual empowerment and collective aspirations, the dimension of significance takes center stage. From open strategy participation to collaborative endeavors and independent innovation to equity and empowerment, significance emphasizes the core tenet that each participant's contributions hold meaning in driving both personal growth and organizational success.

c) Temporality in Strategic Dynamics and Time-Bound Initiatives.

In the context of this discussion, the aggregated aspect of 'temporality' pertains to the well-conceived and -structured arrangement of activities and phases over a span of time. These elements collectively contribute to the all-encompassing and inclusive execution of the strategic plan within the organization. This dimension emphasizes the organization's careful coordination of events and actions, all aimed at achieving participant involvement, strategic flexibility, and a systematic rollout of the strategy.

The concept of timely engagement and communication emphasizes the organization's dedication to involving participants at opportune moments throughout the process. This encompasses various events, beginning from the initial kick-off event in March 2019, where a diverse group of stakeholders participated in a comprehensive event. The commitment to ongoing communication, facilitated through workshops and digital platforms, ensures that the participants are consistently informed. This concerted effort not only fosters a sense of belonging amongst participants but also cultivates a shared comprehension of how the strategy is evolving.

The notion of "adaptive strategy development and implementation" exemplifies the organization's adaptability in the face of challenges and disruptions. The ability to creatively

pivot, exemplified by the transformation of the documentary into workshops in response to the pandemic, showcased the organization's resilience. In addition, the iterative process of refining the strategic plan through multiple rounds of revisions highlights the organization's flexibility in fine-tuning its approach based on feedback and emerging obstacles.

The concept of a “phased approach to strategy development” accentuates the structured, step-by-step methodology that guides the entire process. The development of the strategy is systematically divided into distinct phases, each with its specific purpose, be it raising awareness, fostering understanding or catalyzing action. This sequential approach ensures that the participants undertake a coherent journey, progressively internalizing the strategy and aligning their commitments with the organization's core values.

Collectively, these second-order codes offer insight into how the organization effectively utilizes time as a strategic resource. The meticulous sequencing of events—from the inaugural kick-off event to the creation of the documentary, hosting of workshops and establishment of a digital platform—serves as a testament to how the organization deftly orchestrates temporal components to construct a unified and holistic strategy implementation process. This approach emphasizes the significance of timing in cultivating participant engagement, adapting to challenges and executing the strategy with precision.

In essence, the interplay amongst trust, significance and temporality forms a holistic approach to enhancing participant inclusion in open strategy processes. Trust creates the foundation for authentic engagement, significance recognizes individual contributions and temporality structures the process for effective participation.

5.2.5. Discussion

The case study presented in this article demonstrates how a multinational organization implemented a new strategic plan using an open strategy approach. The study aimed to increase the understanding of how participant inclusion could be fostered within this process, with a particular focus on a unique perspective of inclusion, thereby emphasizing a sense of belonging and authenticity based on the definition by Jansen et al. (2014).

This study contributes to the understanding of open strategy by introducing trust as a pivotal enabler of inclusion. Trust is identified as a lubricant in the complex and interconnected relationship between stakeholders and organizations (Crane, 2020). This finding addresses the gap in research on building trust at the stakeholder level (Crane, 2020) and aligns with the evolving concept of stakeholder trust (Pirson et al., 2017). When trust is developed between both sides, a favorable climate of inclusion is created, and stakeholders are more likely to engage in a fruitful exchange (Crane, 2020). The fact that all employees, irrespective of their position within the organization, were going through the same appropriation workshops and getting the same level of information at the same time also contributed to supporting inclusion in the process, as this higher comprehension of an organization's strategy fosters a sense of belongingness and increases the employee willingness to contribute to the shared business objectives (Tonnessen & Gjefsen, 1999). While this study contributes to the realm of open strategy, it does not go into great depth regarding the exploration of the multifaceted nature of trust and its various dimensions, considering factors that might affect trust-building in the open strategy context, such as power dynamics, historical relationships and external pressures.

Thus, the results of this study reveal that not being included in a phase or activity of the process does not necessarily equal exclusion. Through the element of trust, stakeholders can perceive a sense of belonging and, thus, of inclusion because the signal sent by including another stakeholder in a specific phase of the strategy process is positively interpreted and satisfies their sense of inclusion; this was emphasized in multiple interviews in the study by the participants. It comes down to creating a psychologically safe organization (the extent to which a company encourages an atmosphere in which workers may speak their minds and take calculated risks without fear of retribution) (Edmondson, 2018) for openness to flourish. The process examined in the case study highlights how trust is cultivated through involvement in specific stages, roles, and interactions, thereby fostering a sense of belonging and authenticity amongst the stakeholders.

This study further contributes by revealing that the breadth of participants in open strategy processes is better understood as qualitative inclusion (the status of participant involvement) rather than pursuing a vast number of participants, thereby reinforcing the findings of Cai and Canales (2021), who achieved similar results in their study. They argued that merely bringing together stakeholders to get their input is not sufficient to foster inclusion, which depends on stakeholders having decision rights. However, how inclusivity is perceived depends on how open strategy is conceived of – whether it is seen as limited participation, co-creation, or deep engagement (Vaara et al., 2019, p. 34–36).

In addition, this study, which inscribes itself more into the category of limited participation, shows that the status of the participants' involvement can also be null, as various stakeholders with diverse backgrounds might not be able to jointly develop and enhance the process of open strategy (Splitter et al., 2023), which emphasizes that temporality in inclusion is

extremely important. It is thus the organization's responsibility to create 'zones of inclusion' and manage the interactions and/or non-interactions within them and between them to develop an overall trustworthiness (Crane, 2020) to foster a sense of inclusion even though stakeholders might not be directly involved, thereby contributing to the conception of inclusiveness as modes of participation (Dobusch et al. 2019). Thus, this reveals that organizations need not choose between either collecting the input for decisions from stakeholders (participation) or creating a community of interacting stakeholders engaged in ongoing strategic issues (inclusion) (Quick & Feldman, 2011; Mack & Szulanski, 2017, p. 386) to foster a sense of inclusion amongst stakeholders.

This article reveals that complexity can be reduced in the process, while still maintaining an open characteristic, through balancing the sense of belonging and authenticity of the stakeholders. Over 150,000 employees were included in the open strategy process; however, the complexity was reduced by cutting down the number of people simultaneously involved and playing with the temporality of openness within the process by allowing certain stakeholders to take on the specific roles of facilitators, connectors, and relays of and within the strategic process, as well as empowering the participants to engage themselves in implementing the strategy as a means of building trustworthiness.

The approach adopted in the case study to open the strategic process counterbalances the complexities arising from involving numerous stakeholders and aims to provide a sense of belonging and authenticity to those traditionally excluded. The results of the study reveal that the workshops played a vital role in addressing the commitment dilemma in open strategy (Hautz et al., 2017) and maintaining a balanced approach to complexity, as their objective was to explain and make sense of the entire strategizing process while showing how and what the participants

could do to engage themselves in the implementation of the strategy. However, a potential limitation of this study lies in the limited insight into the challenges of relying heavily on workshops in open strategy processes.

Last, the study highlighted the interplay between transparency and inclusion, thereby indicating that organizations can control the level of openness to some extent through these levers (Hautz et al., 2017; Whittington et al., 2011; Dobusch et al., 2017). By interpreting inclusion through the lenses of belonging and authenticity, the study offers insights into how organizations can balance openness with their organizational climate and contextual influences, which are important elements in the perception of inclusion (Randel et al., 2018). A consistent organizational message fosters inclusion and openness, thereby contributing to an open-supportive organizational culture and enhancing the participants' sense of significance (Adobor, 2019). The study also emphasized that transparency and inclusion are interdependent components of relationships and establish trust through the disclosure of information and influence the perception of inclusion (Albu & Flyverbom, 2019). This study revealed that individuals will perceive a higher level of inclusion and, thus, of openness, if, when excluded from one of the phases of the strategy process, the transparency of the process is maintained or increased. Thus, the study in this article addressed the call to examine how transparency impacts inclusion in open organizing (Splitter et al., 2023). Although the interplay between transparency and inclusion emerged as a central theme, further examination of the delicate balance between these two components is needed. A critical discussion of the scenarios in which transparency might inadvertently hinder inclusion and the potential strategies to mitigate such occurrences would enrich open strategy literature and complement the views brought forward in this study.

5.2.6. Conclusion and Future Research Agenda

This research provides valuable insights into how organizations can enhance participant inclusion within open strategy processes. In essence, the interplay amongst trust, significance and temporality forms a holistic approach to enhancing the participant inclusion in open strategy processes. Trust creates the foundation for authentic engagement, significance recognizes individual contributions, and temporality structures the process for effective participation. The symbiotic relationship amongst these dimensions answers the research question by elucidating how organizations can foster an inclusive and transparent environment, thereby ensuring the implementation of successful strategy initiatives through engaged and committed participants. By introducing trust as a fundamental enabler, managing the temporality of inclusion, and acknowledging the interdependence of transparency and inclusion, this study enriches the understanding of successful open strategy initiatives. In addition, the findings emphasize the significance of psychological safety, qualitative inclusion, and balanced involvement to foster a climate of belongingness and authenticity, ultimately fostering a sense of inclusion amongst the participants.

The case study described in this article is an excellent illustration of a process that may have resulted in many of the difficulties that are common in open strategy, as the process began by being highly closed and secretive and initiated by the top management of the corporate business unit. The approach evolved and grew more open by involving diverse workers and enabling them to interview key corporate stakeholders to discover what was most pressing and critical and what their ecosystem recognized as essential for the firm's future.

This article adds to the literature on open strategy and advocates for stakeholder trust research (Crane, 2020). The sense of justice communicated through such an open and transparent procedure may positively affect the participants' commitment to implementing the strategic plan, opening up a promising future research area bridging open strategy and strategic implementation and responding to recent calls for research in this area (Friesl et al., 2021). In open strategy, stakeholder commitment is discussed often and open strategy is considered highly demanding of participants, which propels the research agenda toward the question of how to efficiently foster the commitment of the stakeholders (Seidl et al. 2019a, p. 19). Future research could build on Adobor (2019) and Hautz (2017) by investigating how organizations could prepare for open organizing and lead open strategy activities.

Chapter 6: Strategy Implementation, Commitment, and Open Strategy

The following section presents the third standalone article developed in this thesis. It is an empirical article based upon the longitudinal case study presented in Chapter 3 and comes as the second of two empirical articles that aim to investigate the concept of open strategy through a strategy-as-practice approach. Table 8 provides a summary of the research process.

Table 8*Summary of the Research Process—Article 3*

Framing	<p><u>Research question:</u> How does materiality support organizational commitment in the implementation phase of strategy?</p> <p><u>Research objectives:</u> The study seeks to address the lack of attention given to organizational commitment in existing research on strategy implementation and to extend the understanding of how materiality impacts the implementation process.</p>
Data collection	<p>The data for this study was collected from various sources, including observation of workshops, workshop artefacts like presentations and recordings, pictures, and interviews with participants from different levels within the organization. The collected data encompassed a range of sources, such as semi-directed interviews, documents, observations, artefacts like a documentary and a card game, and secondary data like survey results and informal discussions. The data collection spanned almost two years and was part of a larger research project focused on understanding the entire strategizing process, with a specific emphasis on the implementation phase within an open strategy context.</p>
Data analysis	<p>The data analysis in this study followed a grounded theory approach informed by prior research to minimize biases. Analysis, coding, and interpretation were performed simultaneously with data collection. The analysis initially arranged collected materials chronologically to establish a timeline, followed by triangulation of data sources to identify major artefacts supporting organizational commitment in strategic implementation. Material artefacts were analyzed independently using a common framework to understand their role and impact. The analysis highlighted three contributions of artefacts: developing understanding, appropriation of strategy, and empowerment to act. Interviews were also coded using NVIVO software, thereby leading to the emergence of first-order codes and subsequent themes. Ultimately, the analysis revealed that knowledge, ability, and willingness are crucial components for fostering and maintaining organizational commitment in strategic implementation.</p>
Findings	<p>The study examines how materiality supports organizational commitment during strategy implementation. It discusses key tools like a documentary, card game, workshop, and implementation platform, as well as connectors who interacted with these artefacts. The study outlines the context of implementation within an international convention adapted due to the pandemic, involving all employees. The documentary "USEFUL" communicates CSR efforts and challenges to inspire commitment. The workshop, guided by a card game, encourages collaborative actions aligned with strategy. The cards game functions as a boundary object, fostering shared understanding. Connectors bridge human and material elements, reshaping roles. From a sociomateriality perspective, these interactions demonstrate distributed agency and role hybridization, enhancing commitment through engagement, emotional connection, and inclusivity.</p>
Discussion and conclusion	<p>The study explores the role of materiality in strategy implementation, thereby emphasizing how material artefacts actively shape the process. Artifacts, such as communication materials and digital platforms, function as boundary objects, facilitating understanding and alignment among employees. These tools contribute to a sense of belonging, legitimacy, and the ability to execute the strategy, thereby enhancing organizational commitment. The study highlights the dynamic interplay between formal planning and tangible artefacts. While the strategic plan provides direction, material artefacts translate it into actionable steps, fostering flexibility and coordination. The research also emphasizes the importance of organizational commitment during implementation, emphasizing that employees' active involvement, shared understanding, and a sense of ownership are crucial for successful execution. Open strategy, while beneficial, should be carefully balanced to ensure accountability and alignment with organizational goals. Overall, the interplay among materiality, strategy, and commitment is essential for effective implementation, thereby requiring ongoing refinement and adaptation.</p>

Materiality and Organizational Commitment in Strategy Implementation: A Case Study on Open Strategy

6.1. Abstract

This article addresses the underexplored area of strategy implementation, focusing on the relationships between materiality, organizational commitment, and successful implementation. The prevalent emphasis on strategy formulation has overshadowed the significance of effective implementation, resulting in a lack of a coherent understanding and definition of the implementation process. The role of organizational commitment in strategy implementation has also been overlooked, and research on how to foster and sustain it is limited. This article reports a longitudinal single-case study of a multinational organization that adopted an open strategy initiative, which was conducted to investigate these dynamics. The article highlights the importance of materiality as a powerful tool in strategy formulation, conveying messages and shaping behaviors. However, there is a gap in knowledge regarding how materiality impacts the strategy implementation phase. By examining the role of material artefacts within the context of a large-scale open strategy initiative, the study reported in this article aimed to bridge this gap and enhance the understanding of strategizing activities during implementation. The findings from the study hold significant implications for organizations, offering insights into the development of more effective communication strategies that leverage materiality to cultivate organizational commitment and drive successful strategy implementation. This article contributes to the literature on strategy implementation and open strategy, filling a critical gap in the understanding of materiality's influence on strategy implementation processes.

Keywords: Strategy implementation, commitment, materiality, open strategy

6.2. Article 3: Materiality and Organizational Commitment in Strategy Implementation: A Case Study on Open Strategy

6.2.1. Introduction

The successful implementation of a strategic plan is a formidable challenge that has received limited attention in both the traditional and open strategy literature (Pryor et al., 2019). Despite its critical importance, the focus has often been on strategy formulation, thus leaving strategy implementation in the shadows (Hrebiniak, 2006; Whittington, 2003). Consequently, the literature on strategy implementation lacks a coherent understanding and unified definition of it (Friesl et al., 2021; Weiser et al., 2020), with an inadequate exploration of how organizational commitment influences the process (Nketia, 2016). In an effort to address these gaps, the study reported in this article investigated the relationships among materiality, organizational commitment, and strategy implementation through a longitudinal single-case study in a multinational organization.

Previous studies have established that ineffective communication is the primary barrier to strategy implementation (Heide et al., 2002). However, the strategy implementation process transcends mere communication and necessitates cultivating ownership and a shared understanding of the strategy among organizational members (Merkus et al., 2019). Consequently, organizational commitment plays a crucial role by driving the determination of the organizational members to fulfil their strategy implementation responsibilities and support the organization's strategic goals (Tawse & Tabesh, 2021). Organizational commitment to strategy, however, has not been accorded the attention it merits in research (Nketia, 2016), including how it can be fostered and sustained through effective managerial practices for successful strategy implementation (Friesl et al., 2021).

It is evident that effective communication is vital for cultivating organizational commitment to strategy as it enables a shared understanding and a sense of ownership of the strategy, which are indispensable for its successful implementation. Involving employees in strategic conversation helps achieve a common understanding of the strategy and induces stronger organizational commitment to and effective implementation of it (Stieger et al., 2012). Although the idea of obtaining collective buy-in for a more effective strategy implementation is not new, looking into the ways in which materiality can increase the level of organizational commitment is.

Materiality has been recognized as a powerful tool in strategy formulation as it is capable of conveying messages (Heracleous & Jacobs, 2008; Jarzabkowski et al., 2013; Kaplan, 2011; Whittington et al., 2006). Previous studies have delved into how materiality shapes strategizing activities, enabling certain behaviors while limiting others (Tavakoli et al., 2017; Werle & Seidl, 2015; Whittington et al., 2011b). However, most of these studies have been limited to the formulation phase of strategy development (Friesl et al., 2021). Consequently, there is a dearth of knowledge about how materiality impacts strategy implementation (Leonardi, 2015).

The study reported in this article aimed to bridge the gap in understanding how materiality supports organizational commitment in the strategy implementation phase. To achieve this, a longitudinal single-case study approach focusing on a multinational organization that recently adopted an open strategy initiative was selected. The case study offered a unique context for observing strategizing activities across various organizational levels, involving a significant number of employees (approximately 150,000) and obtaining insights into the role of material artefacts in the implementation process after an open formulation phase. To explore the answers to the research question posed, this article first dives deeper into the difficulties of

strategy implementation and the importance of organizational commitment within it and then argues how the strategy-as-practice (SAP) approach offers a theoretical background to the concept of materiality and supports the empirical investigation of the study reported in the article on the role of materiality in strategy implementation.

The findings of the present study have the potential to guide organizations in developing more effective communication strategies that harness the power of materiality to foster organizational commitment among their members and drive successful strategy implementation, thereby contributing to the literature on strategy implementation and open strategy. Additionally, they enhance the understanding of how material artifacts influence strategizing activities during the implementation phase, thereby addressing an important gap in the existing literature.

6.2.2. Strategy Implementation, Organizational Commitment, and Materiality

Strategy implementation refers to a “dynamic, iterative, and complex process” that includes a wide variety of “activities by managers and employees to turn strategic plans into reality to achieve strategic objectives” (Yang et al., 2010, p. 165). A performative perspective on strategy claims that strategy must be actively enacted by organizational actors through the practice of ‘reshaping’ reality to align with a desired strategy (Merkus et al., 2019).

A recent study suggested that firms could gain a competitive advantage by striving to reach higher levels of competence, organizational commitment and coordination during the strategy implementation phase (Tawse & Tabesh, 2021). Thus, a shared strategic vision would alter how the organizational members make sense of the strategy and the way they behave, driving them to align their behaviors better with the strategy (Merkus et al., 2019). Middle managers interpret what they should be doing through social interactions among themselves,

such as through conversations and by sharing stories and jokes (Balogun & Johnson, 2005), or through interpersonal managerial actions (Tawse & Tabesh, 2021), such as facilitating, coaching, selling, championing, or supporting. In all these elements, the action of communication is central and can be a source of conflict and frustration because of the participants' unmet expectations (Denyer et al., 2011; Hautz, 2017; Tavakoli et al., 2017).

A) A Review of the Difficulties of Strategy Implementation.

a) Implementation Considered a Basic Application of a Strategic Plan.

According to Gast and Zanini (2012, p. 8), “many organizations struggle with strategic alignment: even at the healthiest companies, about 25% of employees are unclear about their company’s direction,” and “making the vision meaningful to employees at a personal level” and “soliciting employee involvement in setting the company’s direction” are what organizations can do best to align individuals with the organization’s direction, which will support effective strategy implementation. The main concepts of strategy—positioning decisions, a vision, a pattern of choices or a map of value propositions—are meaningful to managers only to a certain extent (Vilà & Canales, 2008) and are even less meaningful to lower-level employees. Although organizational structures, procedures and processes are assumed to influence behavior, the main problem is how people at different organizational levels understand, interpret, and implement the organizational strategy (Friesl et al., 2021). The literature on strategy implementation mainly focuses on the enablers and inhibitors of implementation, which portrays implementation as something passive and not as a process with its own dynamics (Merkus et al., 2019). Thus,

implementation is considered the mere application of predetermined strategic plans (Hrebiniak, 2006) through planning and allocating resources.

b) Numerous Difficulties Encountered in Strategy Implementation.

The problem stems from a failure to completely appreciate the complex nature of strategy and the necessity of linking various components of the process of creating a plan (Vilà and Canales, 2008). A shared knowledge of strategy and its rationale is also required to successfully translate strategy into action. Managing the emergent aspect of strategy and coordinating group activities are significantly distinct from selecting a strategic course of action; this is one of the challenges in strategy implementation (Friesl et al., 2021).

One of the most typical issues in strategy implementation is that upper management does not effectively convey to the other organizational members a logical narrative regarding how the selected approach adapts to the shifting environment (Vilà & Canales, 2008). Other difficulties in strategy implementation have also been brought forward, including the ‘six silent killers of strategy implementation’ involving communication issues, poor management roles and leadership and lack of coordination (Beer & Eisenstat, 2000), as well as unclear strategic goals and lack of simultaneous integration of formulation and implementation (Hrebiniak, 2006).

c) Organizational Commitment as an Essential Element of Strategy Implementation.

Organizational commitment is one of the conditions of effective strategy implementation and is defined as the ‘extent to which organizational members are determined to execute their

implementation responsibilities and support strategic goals’ (Tawse & Tabesh, 2021, p. 27). The conceptualization of commitment in workplace commitment theory as ‘a force that binds an individual to a course of action of relevance to a target’ (Meyer & Herscovitch, 2001, p. 299) is in line with strategy implementation, where “strategic goals serve as the target and commitment serves as the motivational force behind actions to support strategic goals” (Tawse & Tabesh, 2021). Commitment to strategy has received limited interest in research, but it is an important element of strategy implementation (Nketia, 2016).

It is the responsibility of the middle- and lower-level managers of an organization to communicate and clarify the organizational strategy. Their failure to do this may lead to insufficient commitment of the teams operating at the middle and lower levels of the organization to the strategy, which is frequently the cause of the inability to successfully implement strategy (Ateş et al., 2020; Balogun & Johnson, 2005; Wooldridge et al., 2008).

Ateş et al.’s (2020, p. 638) recent study brought forward the concept of visionary leadership—“the communication of an image of a future for the team and organization to persuade employees to contribute to the realization of that vision”—and linked it back to commitment, as the term ‘strategic commitment’ refers to more than just knowing the plan and having a favorable opinion of it and encompasses the employees’ desire to make an effort to implement the strategy (Ateş et al., 2020; Westley and Mintzberg, 1989).

d) Transparency and Inclusion in Open Strategy as Enhancers of Organizational Commitment.

Open strategy presents a challenge to the conventional understanding of strategy because it seeks to involve individuals who were excluded from the process in the past. It has been defined in the academic literature as adhering to two primary guiding principles: inclusion and transparency, both within and beyond the boundaries of the organization (Chesbrough & Appleyard, 2007; Whittington et al., 2011). Inclusion in open strategy involves consulting a larger variety of individuals that are often excluded from the ‘strategic conversation’ and also aims to expand outside the borders of the organization to widen the pool of people who will participate in the process (Whittington et al., 2011). The implementation of open strategy also increases transparency, which may be defined as the “visibility of information about an organization’s strategy, potentially during the formulation process but particularly with regard to the strategy finally produced” (Whittington et al., 2011, p. 536). Open strategy addresses the need for a complex and demanding process of implementing strategic decisions through open and lateral communication, allowing information to flow freely so that the intended changes can be championed and understood (Lampaki & Papadakis, 2018, p. 627). It responds to concerns regarding the need to involve more employees and generate higher involvement beyond the management ranks in strategy procedures (Mantere, 2005; Mintzberg, 2009). For the strategic plan to be effectively implemented, it needs to be owned by all levels of organizational members, from upper management to lower-level employees. Every manager is responsible for the implementation of the plan; it is not something that “others” do. However, when there is more interaction between the “doers” and “planners” or when there is a higher overlap between the

two processes or activities, the likelihood of successfully implementing a strategy increases (Hrebiniak, 2006).

B) The Interplay of Materiality and Organizational Commitment in Strategy Implementation.

In the context of strategy implementation, organizational commitment plays a pivotal role as a driving force behind organizational members' determination to execute their implementation responsibilities and support strategic goals (Tawse & Tabesh, 2021). For successful strategy implementation, organizational commitment needs to be fostered across all levels of the organization, from upper management to lower-level employees (Ateş et al., 2020; Balogun & Johnson, 2005; Wooldridge et al., 2008). Building organizational commitment and a shared sense of purpose requires active and inclusive involvement (Vilà & Canales, 2008).

The SAP approach focuses on the numerous social and material practices involved in the formulation and execution of strategies (Johnson et al., 2003; Rouleau, 2005). It acknowledges that strategy is not simply a cognitive process but also a physical and embodied activity (Heracleous & Jacobs, 2008; Jarzabkowski et al., 2013; Vaara & Whittington, 2012). The study of strategy has shifted, with practice-based researchers focusing not on what organizations have but on what people in organizations do (Jarzabkowski et al., 2007).

Recent studies on SAP have recognized the significance of materiality in strategy work (Balogun et al., 2014, 2015). Materiality refers to the physical and digital elements (e.g., tools, locations, and spatial arrangements) that shape strategic interactions between individuals and their environment (Heracleous & Jacobs, 2008; Jarzabkowski et al., 2013). Artifacts such as

PowerPoint (PPT) presentations, frameworks, and maps play a crucial role in mediating social interactions, creating shared meaning and shaping strategy development and implementation (Kaplan, 2011; Werle & Seidl, 2015; Jarzabkowski et al., 2013).

The concepts of materiality and organizational commitment intersect in strategy implementation through the communication process and the use of artefacts. Communication, both direct and indirect, is central to strategy implementation (Denyer et al., 2011; Hautz, 2017; Tavakoli et al., 2017). Artefacts “enable and constrain knowledge sharing across boundaries” (Spee and Jarzabkowski, 2009, p. 228) and thus function as boundary objects that facilitate communication between different groups and contribute to the formation of shared meaning (Spee & Jarzabkowski, 2009). Negotiations over the use and interpretation of artefacts influence the process of strategy implementation (Belmondo & Sargis-Roussel, 2015; Heracleous & Jacobs, 2008).

By adopting a strong perspective on materiality in which the social and the material are seen as inextricably intertwined, we can understand how material artifacts play a role in shaping strategic practices and organizational commitment within an organization (Orlikowski & Scott, 2008). The materiality of artifacts influences human behavior and actions, thereby shaping the contours and possibilities of everyday organization (Orlikowski, 2007). In this manner, artifacts indirectly contribute to fostering organizational commitment among organizational members as they help translate the strategic plan into action and guide employees towards aligning their behaviors with the desired strategy.

To obtain a comprehensive understanding of the elements influencing strategy implementation, it is essential to explore the materiality of artefacts and their role in communicating the strategic plan. Investigating how organizational commitment is fostered

through indirect communication stemming from artefacts can shed light on the intricate relationship between materiality and organizational commitment in strategy implementation. Such insights will contribute to a deeper understanding of the dynamics at play during strategy implementation and offer valuable guidance to organizations seeking to enhance organizational commitment and achieve successful strategy execution.

6.2.3. Methodology

SAP is concerned with “the doing of strategy: who does it, what they do, how they do it, what they use, and what implications this has for shaping strategy” (Jarzabkowski & Spee, 2009, p.69). According to this perspective, strategy is not something an organization has but something its members do (Jarzabkowski et al., 2007, p. 6). The SAP approach extends existing theoretical perspectives by emphasizing the fine-grained actions and interactions that constitute activity (Jarzabkowski, 2005). It focuses on strategy practices, which are defined as ‘accepted ways of doing things, embodied and materially mediated, that are shared between actors and routinized over time’ (Vaara & Whittington, 2012, p. 278). These practices provide the means for multiple actors to interact and engage in collective action (Jarzabkowski et al., 2007).

Because strategizing occurs at numerous levels and not only at the top management level, the unit of analysis in the present study was also impacted by the decision to undertake the study using the SAP approach. The present study thus included lower-level employees and middle managers in its analysis to investigate how a strategy is digested and impacted by those situated at lower organizational levels and how it is translated into the day-to-day practices that produce strategy and change (Balogun et al., 2003).

As very little research has focused on the materiality of strategy implementation, a qualitative inductive research approach was utilized for this study. In particular, a longitudinal single-case study was conducted, in line with the understanding and definition of Merriam (1998), combined with Yin's (2018) approach, which stimulated the rigor needed in designing the case study before the data collection to build a clear roadmap and adopt Stake's (1995) flexibility. This allowed the design to evolve even after the data collection had begun, confirming Stake's viewpoint that not everything could be mapped out upfront. Furthermore, a single-case study is the most effective method for obtaining in-depth comprehension of particular activities (Langley, 1999). Because single-case designs provide in-depth insights into the phenomena being investigated, they are particularly beneficial for answering 'why' and 'how' questions in organization and strategy research (Easterby-Smith et al., 201; Williams, 2000).

A) Research Setting.

The case study took place within a global corporation (HomeCo, anonymized name) operating in the home renovation and do-it-yourself sector. HomeCo has adopted a platform-based approach to its operations, which enables all its stakeholders to improve their technical and human abilities in tandem with those of others in their ecosystem, while retaining their agility and responsiveness. HomeCo is made up of over 150,000 people who have been drawn together by a common mission and a worldwide challenge. In addition, it uses a cooperative approach to development, pioneering participatory management through a shared decision-making process that helps shape the group's future. The case study concentrated on a strategic project recently implemented by HomeCo. This project aimed to co-construct a new strategic turn for HomeCo by developing a corporate strategy that incorporates corporate social responsibility (CSR) and

involving all the company’s business units (BUs) in the development process. This was accomplished through stakeholder consultation, collaborative strategy formulation and an organization-wide series of sensemaking workshops and implementation. Thus, the case study focused specifically on the project’s process and on the individuals who participated in it. The focus of this article, however, is the implementation phase of the strategic plan. Although strategy implementation can span multiple years, the implementation phase at HomeCo is still ongoing and thus has not been investigated in its entirety. The present study was conducted during the first two years of the implementation phase, starting with the deployment of the strategic plan (approximately one year) and the initial execution of the plan (approximately one year).

B) Data Collection.

Our data originated from a wide variety of sources, such as observations of workshops, collection of workshop artefacts (e.g., PPT presentations, playing cards, recordings, a documentary and screenshots/pictures) and interviews with various organizational participants (Table 9

). The data obtained provided a fuller description of the situation and the potential for triangulation.

Table 9

Data collected: Source, Type, and Length

Data source	Description	Type	Amount/length
Semi-directed	These interviews were conducted within various	Audio	recordings, 50 interviews >

interviews	business units of HomeCo and included people in the organizing team who actively participated in the crafting and facilitation of the appropriation workshops and middle managers and lower-level employees who facilitated and/or took part in a workshop and/or actively implemented the strategy in their day-to day actions.	written transcripts, written notes	33.5 hours (min: 14 minutes; max: 84 minutes)
Documents	‘Connector kits’ (PowerPoint [PPT] presentations, notes and guidebooks [Word documents] for facilitating a workshop), PPT presentation about the card game, PPT presentation about the strategy	Word documents, PPT presentations, minutes of meetings	13 items
Observations	Observation of appropriation workshops: participation in two workshops and observation of how the workshops were organized and held and what materials were used.	Pictures, written notes	6 hours
Artefacts	The documentary, card game, workshop, connector’s kit and implementation platform	Word documents, PPT presentations, screenshots/pictures, videos	5 items
Secondary data	Documentation of workshops through pictures collected from third parties and surveys, informal discussions with participants outside of the formally programmed interviews, screenshots of websites dedicated to the presentation of the strategy and of internal social media posts	Survey results, screenshots/pictures, written notes	91 items

Data were collected over a period of almost two years (May 2021–January 2023), and a rich set of processual data was obtained (Langley, 1999). The data collection was part of a larger research project that aimed at looking into the overall process of strategizing, including the ideation, formulation, and implementation phases of a strategic plan. However, the focus of this article is the implementation phase. The initial project began with an interest in diving deeper into strategy implementation in an open-strategy context, looking into how increased transparency and inclusion would affect this phase of strategizing. It was only later, when we were collecting data and moving through an iterative-inductive approach to collecting and analyzing data (Orton, 1997), that the materiality approach appeared to us as an interesting angle

to contribute to the discussions in several research fields. As data collection was being conducted and interviews were being held, new artefacts were brought to our attention, and focus on them was included in the various iterations of the interview guide used during the project and on the artefacts collected for integration as data sources, such as the card game, the documentary and the online platform used to drive strategy implementation.

C) Data Analysis.

The process of theorizing grew gradually from the observation of facts and interpretations following the grounded theory approach (Bryant & Charmaz, 2011; Glaser et al., 1968), not in its strictest sense but informed by prior research on theoretical constructs to avoid biases. The data were analyzed, coded, and interpreted immediately after being collected.

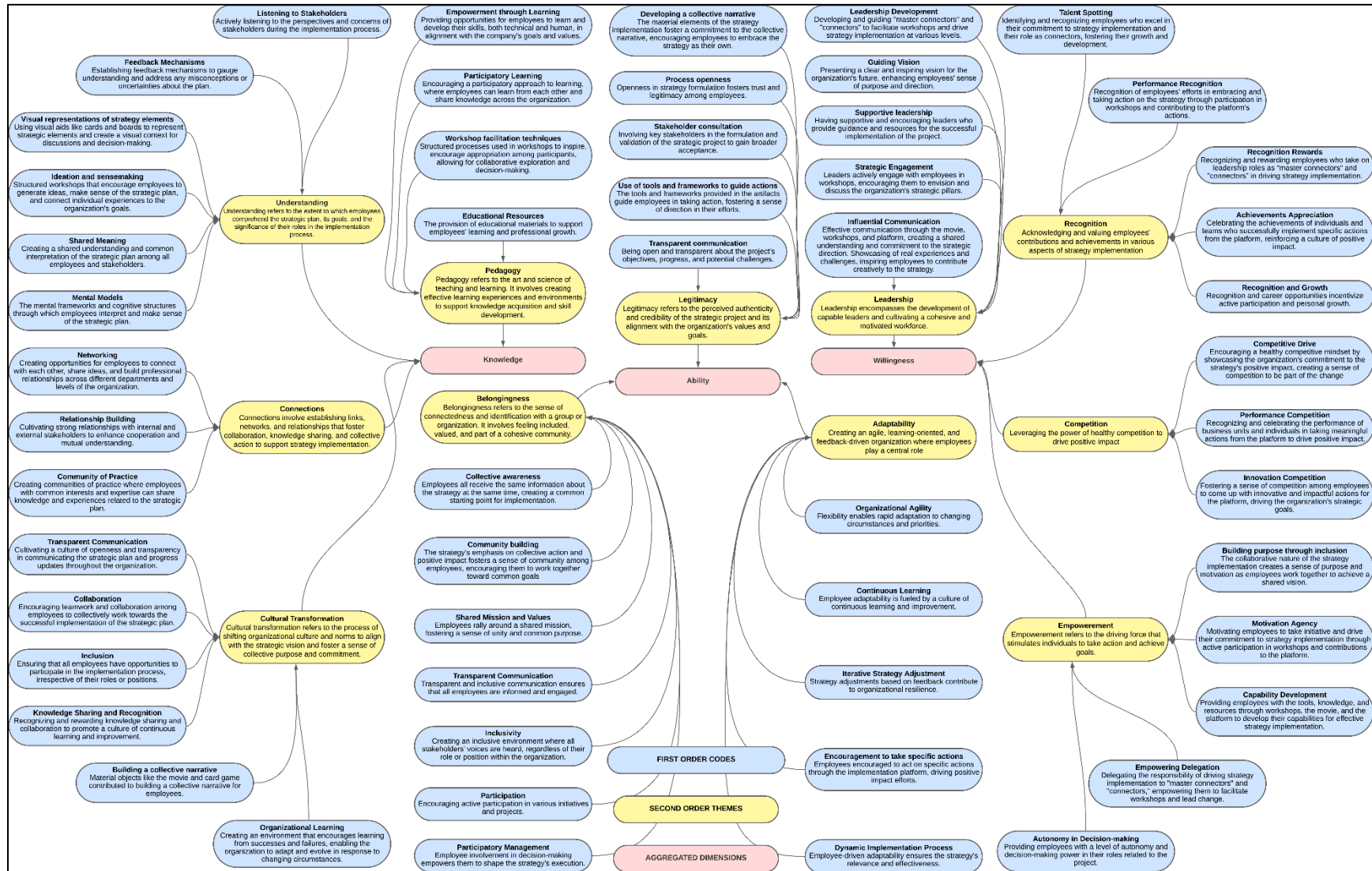
First, all the material artefacts that had been collected were arranged chronologically to establish a timeline (Langley, 1999); this ensured that the various artefacts could be placed in their proper historical contexts. Second, the data were triangulated to identify the major artefacts that supported organizational commitment to strategy implementation.

Working through the data, the material artifacts were first analyzed independently in order to determine how, through the researcher's interpretation, these artefacts helped in the achievement of the implementation of the strategic plan and how they fostered organizational commitment. Artifacts were analyzed along a common framework, and the purpose and background, structure and objectives, target audience, impact and outcomes, and limitations for each artefact were stated. From this stage, a first level of knowledge arose as open coding was undertaken to understand what factors contributed to “the force that binds an individual to a

course of action of relevance to a target” and/or the “employees' desire to put out effort in carrying out the strategy.” The numerous artefacts pointed to having three separate contributions in this regard, which are as follows: (1) developing one’s overall understanding of the strategy, (2) developing one’s appropriation of the strategy, and (3) developing empowerment to act. The subsequent analysis and coding of the interviews helped complete this interpretation. NVIVO was used to code and organize the codes that emerged from the analysis of the artefacts and the interviews. During the coding process, the newly generated codes were sorted into multiple categories (first-order codes), and recurring themes were discovered (Figure 10**Error! Reference source not found.**). Following many readings and coding of the data, the first order codes were transformed into second-order themes, thereby producing an interpretation of the data that was more theoretical in nature. As a final phase in the process of establishing a grounded understanding of the issue, the analysis revealed that knowledge, ability, and willingness (aggregated dimensions) are three components that are necessary for developing and maintaining organizational commitment in strategic implementation.

Figure 10

Coding Levels—Article 3



6.2.4. Findings

As the purpose of the present study was to gain an understanding of how materiality supports organizational commitment throughout the strategy implementation phase, a comprehensive explanation of the artefacts that were developed and utilized for this phase (a documentary, a card game, a workshop and its toolkit and an online implementation platform) and of the human agents that played a key role as connectors in interacting with these artefacts is provided herein. Then, how these tools and frameworks contributed to organizational commitment within the strategy implementation phase via their materiality is demonstrated.

A) Case Description and Field Insights.

a) Setting the Context.

After the writing of the strategic plan, the new direction that HomeCo would be taking had to be presented to the employees because even though the strategy was formulated through an open process, not all the 150,000 employees were included in the formulation phase. The initial plan was to host a large international convention in March 2019 to present the recently developed strategic plan to the over 700 top, middle- and first-line managers of HomeCo, as well as members of the larger ecosystem, who would be invited to the event. However, the coronavirus disease 2019 (COVID-19) pandemic prompted lockdowns, store closures and travel restrictions worldwide, making it impossible to hold the event.

However, the organizing team believed that they were prepared to share HomeCo's recently developed strategic plan, that the time for this had come and that they could not put off doing so. Consequently, they modified their delivery strategy, developing multiple elements (an

appropriation workshop in which a documentary and a card game specifically created for the workshop were shown/played, an implementation platform and an open information website) and launching these, taking advantage of the new remote-working mode to enable HomeCo's 150,000 employees worldwide to appropriate the new strategic plan instead of only the top 700 employees, as initially planned.

It must be emphasized that the strategy implementation phase described above was unique and that the new strategic plan was originally intended to be presented only to the top 700 employees at the international convention in March 2020. Naturally, in that setup, some information needed to be disseminated to HomeCo's numerous BUs through their chief executive officers (CEOs) and managers, among others. Each person would have devised a means to communicate the information with the employees in their BU or store. It would have been difficult to measure what and how much of the content was actually shared with the 150,000 employees. This underscores the relevance of the delivery method of a strategic plan. The methods employed in the case study were extremely unique, which makes them fascinating subjects of research.

b) The Documentary.

The documentary *Useful* (Figure 11 **Error! Reference source not found.****Error! Not a valid bookmark self-reference.**) was designed by HomeCo's communication department, under the supervision of the organizing team, as an illustrated documentary (words, videos and key figures), drawing testimonies from real experiences and sharing facts and evidence of what HomeCo had already done in terms of CSR. It also presents the challenges that HomeCo needs to take on to find solutions and actions that are synergistic, inclusive, and impactful, thereby

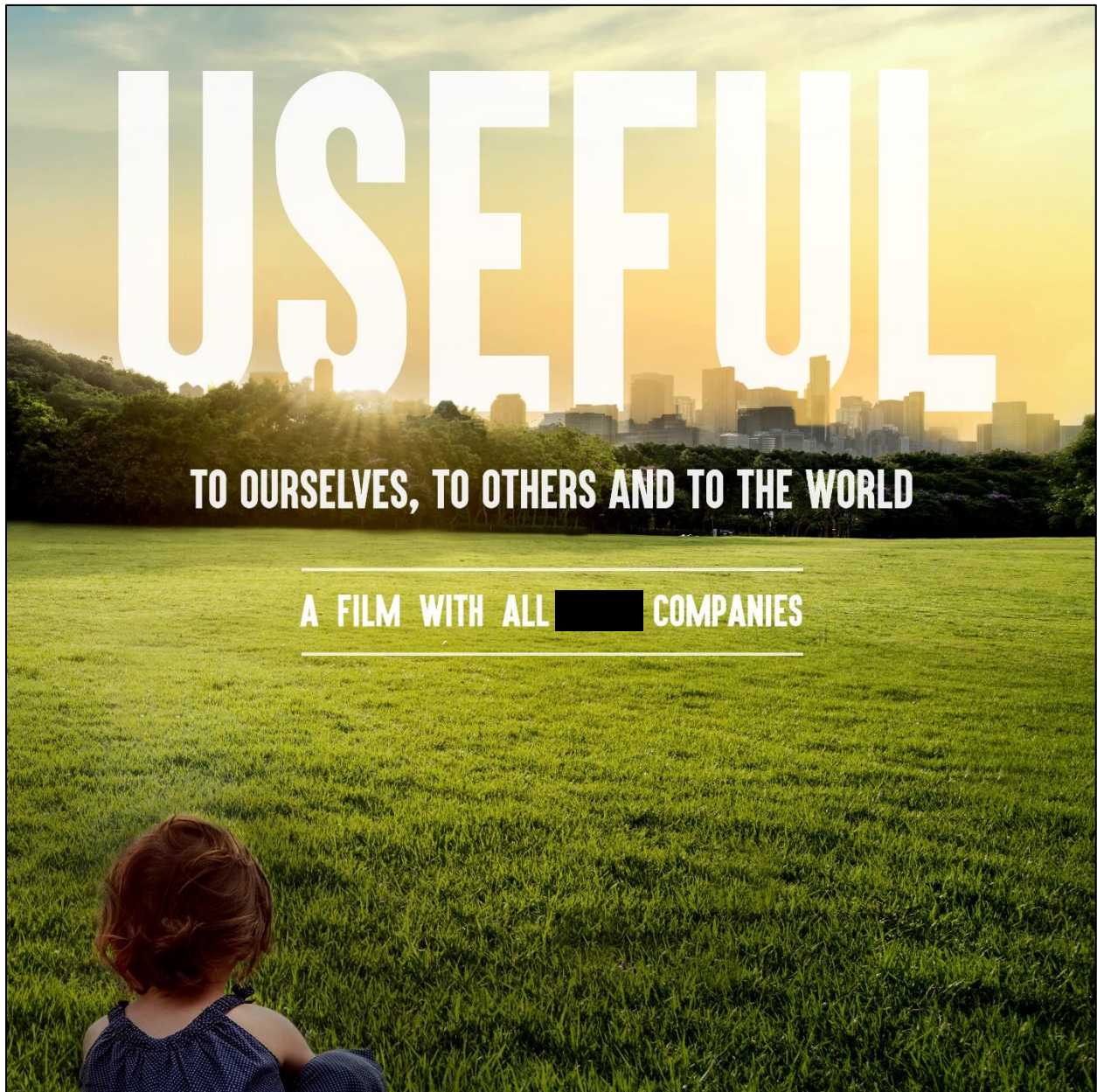
combining the economic, human, and environmental aspects. It was designed for all employees, town mayors, suppliers, clients, and other stakeholders to understand the future strategy of HomeCo. The documentary was produced in May 2020. The organizing team argued that the material's content should be understandable not only by strategists but by all, regardless of personal background.

The goals of the documentary are to share firsthand knowledge of what is happening in HomeCo's various BUs and to enable individuals to comprehend and utilize the organization's new strategy. Additionally, the documentary highlights the variety of HomeCo's business divisions, features numerous countries and companies and ensures gender balance. The organizing team established the following rules to make sure that the message would be communicated throughout HomeCo: (1) the documentary had to be shown during collective meetings; (2) it had to be viewed during working hours; (3) a communication kit was to be provided to those organizing the viewing (connectors, whose role is presented in a subsequent section), whose instructions they had to follow strictly to ensure that all documentary viewers would have the same experience (the workshop, though, could be modified to suit the local context); (4) feedback regarding the documentary had to be collected and submitted via Google Forms to see which subjects were gaining the most attention and (5) the working group had to meet regularly to discuss the pledges.

Based on the 8,000 verbatims generated from the stakeholder consultancy during the ideation phase, 24 pledges were developed for the strategic plan and presented in the documentary. Twelve of these pledges were mandatory elements to be implemented (e.g., gender equality, employee listening and carbon statement), and the remaining 12 were voluntary (e.g., teaching responsible consumption).

Figure 11

*The Documentary Poster*³



HomeCo communicated the same information (the organization's strategic plan) within a common time frame stretched out over a few months and shared by all employees, whether a corporate director, the CEO of a BU or a hardware sales adviser at a shop in Brazil. As of this

³ The name of the company has been anonymized on the movie poster.

writing, over 8,800 workshops have been conducted across all BUs. This has led to a kind of awareness impregnation and marked the beginning of a shared-action process. People could no longer claim ignorance. It put everyone on the same starting line. This is communicated through the title *Useful*, the slogan ‘to ourselves, the others and the world’ and the documentary poster (Figure 11a) *Setting the Context*.

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Figure 11), which conveys the idea of a community. The documentary first explains what the organization is already doing in terms of what the newly designed strategy is aiming for and how every single BU has, in some way, already started acting upon the elements of the strategy. Thus, it conveys the message to the employees that their organization is already engaged in the strategy, that the newly developed strategy is based on what they have already been doing individually as employees and that all the best practices will be identified and scaled up.

By considering the affordances of the documentary in relation to organizational commitment, organizations can leverage this artefact during the strategy implementation phase. The documentary can serve as a powerful communication tool during this phase, facilitating communication, inclusion, and a shared understanding of the strategy. It can also convey the organization's strategic vision and goals visually and emotionally, which can make them more meaningful and relatable to employees at a personal level, thereby fostering a sense of ownership of them and emotional engagement with them. All of these are crucial in developing a sense of commitment to the strategy among organizational members and driving successful strategy implementation.

Okay. I'm part of something bigger. I'm part of a community that's already engaged in something. You learn about many things that are happening in different business units, in different stores, and so you get inspired by this, and it stimulates you to take the next step. Inside you, you say, 'Okay, now that I know this, now that I understand this, how do I act?' [INT43](#)

As an audiovisual medium, the documentary can evoke emotions and create an emotional connection with the audience. Emotional engagement is crucial in building commitment as it motivates employees to exert effort to carry out the strategy. By appealing to emotions, the documentary can inspire a sense of purpose and dedication among employees towards achieving the organization's strategic goals.

Open strategy, which involves transparency and inclusion, can be facilitated by the documentary as an artefact. When shared with a wide audience, including non-management, the documentary can promote inclusion in strategic conversation. Transparency is also supported as

the documentary presents the strategic plan visually, thereby making it visible and accessible to all, potentially during the formulation process and particularly during the implementation phase.

Moreover, the documentary can help organizational members align their behaviors with the strategic vision as it showcases the desired future for the organization and persuades employees to contribute to its realization. When employees see and understand the organization's strategic direction portrayed in the documentary, they may alter their behaviors to make them align better with the strategy, thereby enhancing their commitment to its successful implementation.

Employees would refer to the 'Useful' documentary when talking to their colleagues or to justify one of their actions, saying, 'That's not useful'. Others would simply say that it's not in line with 'We Make it Positive', which is the name of the strategic plan. [INT45](#)

Finally, the documentary can act as a boundary object, enabling effective communication and shared meaning-making between different groups involved in strategy implementation. Boundary objects are artefacts that bridge the gaps between different perspectives and facilitate coordination and collaboration. As mentioned earlier, the goals of the documentary are to help rally diverse organizational members around the strategic goals and foster a collective commitment to achieving them.

c) The Workshop and its Toolkit.

After the decision to make the documentary, the question of how to deliver it was crucial. Based on the five rules presented earlier that were set to make sure that HomeCo's newly developed strategic plan would be communicated throughout the organization, the idea of a workshop emerged. The sessions were structured around the following three steps: inspiration,

appropriation, and commitment. The word “together” was crucial throughout these three processes, and the following questions were posed to the participants: “How do we collaborate to be inspired?” “How do we apply and reason together?” and “How do we commit together, and to what do we commit?” The goal of this workshop was to help the participants determine what they would commit to as a brand, in their business and in their department. Over 70,000 employees had attended the three-hour sessions by September 2020, and 110,000 by June 2021.

The workshop was divided into a number of stages, beginning with an inclusion period, followed by the visioning of the documentary, a card game (explained in detail later) that was specially developed for the workshop, a period for gathering everyone’s emotions, and a time to choose which of the 24 pledges (brought forward in the strategic plan) one wants to act upon. The entire process of conducting the workshop was reflected in a toolkit, with the necessary presentations, communication elements and information provided. This toolkit was made available to those who oversaw the deployment of the workshops.

As all the aforementioned activities were mostly conducted during the COVID-19 pandemic, all of them were done online (via video conferencing) or face-to-face when possible, using all the languages spoken in the organization. The specific goal of the workshop was for the participants to rearticulate, remanipulate and become aware of HomeCo's newly developed strategy through the card game, which helped to gain knowledge and transmit that knowledge to others. At the beginning of the workshop, the participants were asked if they felt useful in their work. At the end of the workshop, they were asked to choose three of the 24 elements in the card game that would encourage them to take action personally. The facilitator guided the exchanges among the participants, who were required to challenge each other to find actions that were achievable together and were virtuous and impactful. The idea was to seek actions with positive

impacts so that the group/team could begin carrying them out immediately. These were the ‘side steps’ that the group/team could begin taking immediately and that could combine maximum synergies in the creation of economic, environmental, and human values. The group then posed for a photo before the workshop organizer held a debriefing session to maintain a record of the workshop.

The workshop provided a substantial amount of information and linked several people. The plan was to provide each employee with an opportunity to continue writing the story and select the topics that made the most sense wherever they were to activate, execute and multiply them. Apart from the differentiation of pledges, which are more of obligations for all BUs, the offered plan provided a fundamental foundation. This process and workshop provided the tools to each employee to be able to act in this sense.

The workshop was designed to foster collaboration, inspire commitment, and create a sense of togetherness among the participants. The three-step structure of the workshop (inspiration, appropriation, and commitment) encouraged the employees to actively engage in strategic conversation and understand the strategic goals of the organization. Through repeated card readings, discussions and activities, the workshop provided a platform for the participants to internalize and rearticulate the documentary’s message, including the strategic objectives of the organization.

The focus of the workshop on collaboration, togetherness and repeated challenges enabled the participants to develop a sense of shared purpose and commitment to the organization’s strategic goals. By involving employees at all levels of the organization, including middle- and lower-level managers, the workshop addressed the need for active and inclusive

involvement in strategy implementation. This inclusive approach aligns with the principles of open strategy, where transparency and inclusion are key drivers of participation.

There are many employees who will no longer consider doing their jobs in any other way than by including the elements presented in the strategy, as they have the means to do so and to express them. Others experience a kind of stillness between the moment they feel released and when things resume as normal. The conversion of all does not result from the conviction of one. The goal is to prevent this approach from becoming merely an expert subject. Creating a topic that everyone could utilize was the goal. [INT43](#)

Moreover, the materiality of the workshop, such as the specially developed card game, served as a boundary object that facilitated communication and created shared meaning among the participants. Artefacts, in this case, played a role in shaping strategic practices and fostering commitment. The workshop's use of material artefacts indirectly contributed to the alignment of employee behavior with the desired strategy, ultimately increasing organizational commitment during the implementation phase.

By providing employees with the opportunity to determine their commitments as a brand, in their business and in their department, the workshop empowered them to take ownership of the strategic plan and actively participate in its execution. This sense of ownership and active involvement contribute to higher levels of commitment, thereby making employees more motivated to make an effort to implement the organization's strategy effectively.

In summary, the workshop afforded an environment that could foster organizational commitment by actively involving employees in the strategic conversation, creating a shared understanding of the organization's strategy, and promoting a sense of ownership of and dedication to it. The interplay of materiality and organizational commitment in the workshop

could contribute to strategy implementation, thereby aligning individual actions with the organization's desired outcomes.

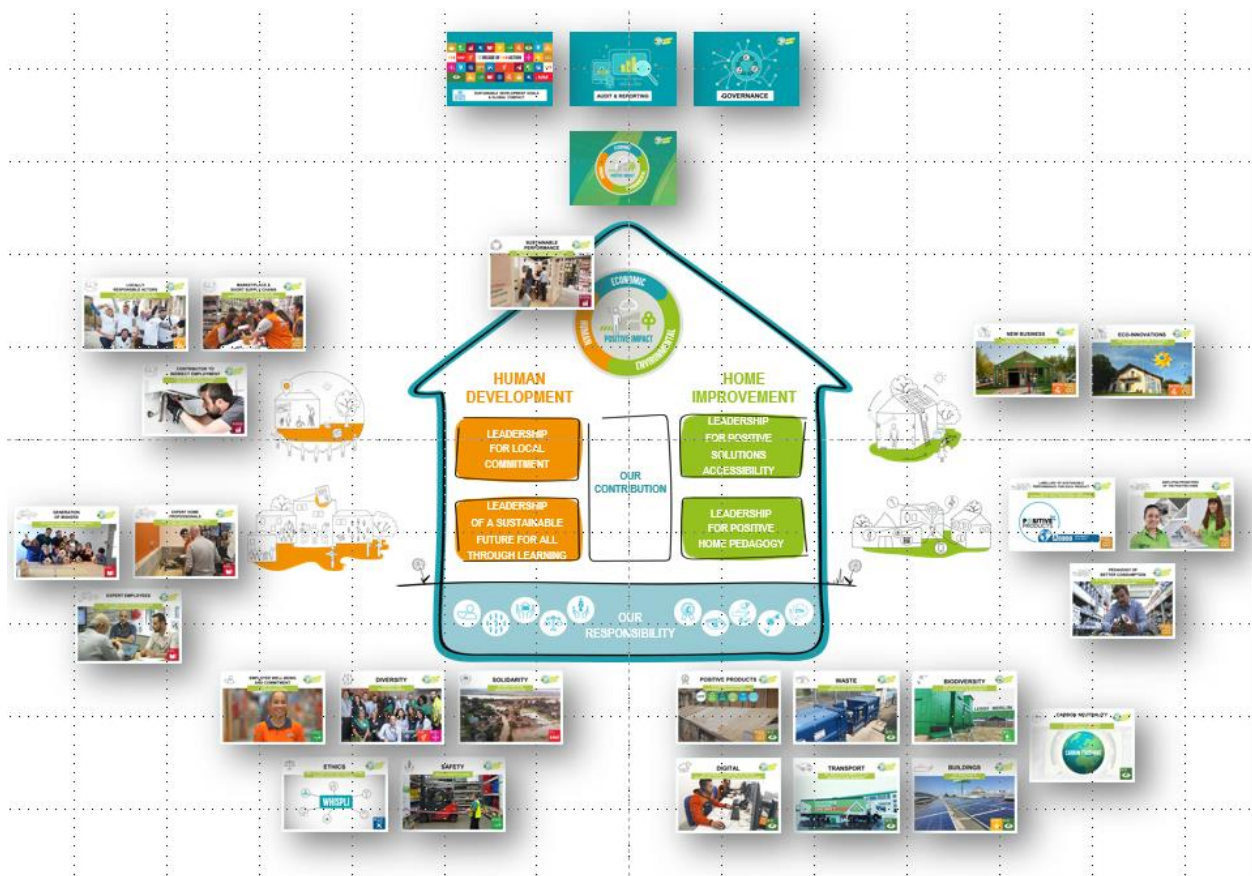
d) The Card Game.

The card game was created based on the logic of Climate Fresk, a card game that was created to explain the causes and consequences of climate change through a three-hour interactive workshop. It was realized that a card game had to be added to the workshop because the documentary alone would not suffice. People needed to have a good time and had to be captivated by images and music and wander off via their imagination. However, they also needed to concentrate on and imprint in their minds the notions that were being brought forward.

Participants of the workshop were each given a couple of cards to read on their own. Thereafter, they had to explain the cards they had chosen to explore to the other workshop participants (each participant had only a couple of cards to explore out of the whole deck), and finally to position them within the house on the game board (Figure 12). Through repeated card readings and by replacing the cards on the game board, the employees were able to experience and visualize the strategic elements brought forward. The manner in which the game was designed allowed them to hold and read the cards and then place them within the collective 'house' representation of the strategy (Figure 12**Error! Reference source not found.Error! Not a valid bookmark self-reference.**).

Figure 12

Card Game Used in the Workshop (Cards and Game Board)



The cards provided a structure for why the organization was pursuing a specific objective and how it was planning to pursue it and were reminders of the objective itself. They also stated landmarks so that the cards could be repositioned on the game board. To convey the idea of urgency and highlight the severity of the climate emergency, short implementation timelines were deliberately set. As they set five- or ten-year deadlines, the organizing team agreed that they could not discuss the climate emergency or the ecosystem emergency. Often, by the time the information was delivered, the set deadline had already nearly passed. This sense of urgency can motivate organizational members to be more committed to implementing the strategy promptly and effectively. The structure of the game, with specific obligations and actions to be

taken within certain time frames, reinforces the participants' commitment to fulfilling their responsibilities in line with the strategic goals. The notion was that it was up to everyone to take responsibility and say, 'Okay, I'll decline this, this, and this'. This was also the purpose of the question that was posed to the participants at the end of the session, asking them what actions they wished to take. They had the option to go more quickly and on their own terms. The pledges made were wide in scope, yet they were extremely specific. The framework was clearly established, but if its boundaries had already been investigated, it was acceptable to venture beyond it. Overall, everyone had the chance to express themselves and provide their views at some point in time; whether during the ideation phase, the formulation phase, or the implementation phase, they had the freedom to speak their minds or suggest something at any moment.

The card game, as a material artifact, can play a significant role in fostering a shared understanding and ownership of the strategy, as well as organizational commitment to it, among the organizational members during the process of strategy implementation, which can promote the success of the implementation. Acting as a boundary object, it facilitates communication between different groups within the organization. As an interactive tool, it helps create a shared meaning and understanding of the strategic objectives among the participants. Through the game's structure, objectives and landmarks, the participants are prompted to engage in discussions and interactions that lead to a deeper comprehension of the organization's strategy. This shared understanding is vital for aligning individuals with the organization's direction and fostering their commitment to achieving strategic goals.

The game's interactive and enjoyable nature enhances the participants' engagement and involvement in the strategy implementation process. By actively participating in the game,

employees are likely to feel a sense of ownership of and responsibility for the strategic plan. Involving employees in the strategic conversation enables them to contribute their ideas, opinions, and suggestions, which fosters a greater commitment to the strategy.

As an artefact, the game influences human behavior and actions. The manner in which the participants interact with the game, make decisions, and respond to the challenges presented shapes their commitment to the strategy. The game's materiality indirectly contributes to fostering organizational commitment by guiding employees towards aligning their behaviors with the desired strategy.

Some people even keep a deck of cards and take them out when they need a reference for something in a discussion. [INT43](#)

In summary, the card game, as a material artefact, supports organizational commitment in the strategy implementation phase by facilitating communication, promoting a shared understanding of the strategy, enhancing involvement, and reinforcing a sense of urgency.

Overall, the card game served as a valuable tool in the interactive workshop, enriching the participants' learning experiences and encouraging active participation and personal commitment among them to addressing the climate emergency and carrying out the organization's strategy. As its design was aligned with the workshop's objectives, it was an effective means of conveying information and fostering individual agency and responsibility in tackling strategy implementation.

e) The Implementation Platform.

After the first step (raising awareness) towards implementing the strategic plan, the second step that needed to be set in motion was to act. The documentary and workshop worked

well to raise awareness and encourage people to commit to implementing the strategy. However, in one of the French BUs, the question of how to get employees to take the right actions to support the objectives that were set in the strategy remained, particularly with reference to CSR actions, where much time could be spent doing things with little or no impact. This was how the development of the implementation platform came about.

The platform was jointly developed with an external startup that lists all the actions that can/should be done at a store level in regard with the newly deployed strategy. The platform was structured around five pillars and incorporated only actions that served the company's positive-impact strategy. The platform provides detailed information regarding each action, including implementation steps and budget and time requirements. This guidance helps employees understand how to execute the actions effectively and contributes to their commitment to fulfilling their implementation responsibilities.

To date, 90 actions have been referenced on the platform, based on what was being done in the field and which ones were working well and/or on what was identified as being a priority by the business referents at the national level, who then developed operating procedures. However, employees can also make suggestions for new actions on the platform. To date, 170 suggestions have already been made and are being worked on. These suggestions are then validated by the business referent if the action makes sense at the national level; the referent then works on the action card in the platform in partnership with the person from the store who has the field knowledge to implement it.

Each action card follows the same template: there is a photo accompanied by the meaning of the action, why it is a positive-impact action, which of the five pillars it is part of and what type of action it is (essential, 100 points; secondary, 20 points; optional, 5 points). On the card,

there is also information about the action's implementation steps (e.g., budget, time, and space), which stores have already implemented the action and a contact link to the business referent of that particular action in case there is a need to ask a specific question about it (questions and answers are then displayed on the action card page and to create a "Frequently Asked Question" section). Within a time frame of 8 months after the platform launch, 3,500 actions were registered by all the stores.

There are two specific populations that can act to make a corporate transition: the business and market management population at the head office and the store population. However, transformations, particularly environmental ones, are likely to take place within the head office (supply, transportation, and product side) because if it does not bring virtuous products to stores for selling, the stores cannot sell them. Then, there is the store population, which is very important in cultural transformation in terms of identity as it represents the larger part of the organization's employees.

The implementation platform was developed at a later stage, after most employees had participated in an appropriation workshop. The idea behind the platform, as explained previously, was to encourage people to take specific actions that would help build impact and guarantee that everyone was working in the same direction. Specifically identified people were put in charge of driving various subjects and thus actions from the platform within their team, store or department. Some took on the role because they were convinced of the importance of acting upon the topic and because it spoke to their personal values. Others were asked to take on the role, got caught up on the content and started to be convinced themselves. Others saw this as another way to gain personally from the matter in terms of career development and recognition. The analysis of the interview transcripts revealed that the platform empowered individuals who

were initially not too convinced to implement the strategy but did it because of their willingness to be recognized through the platform and/or because they were designated as being the person in charge of implementing the actions listed on the platform by their bosses.

The platform functions as a material artefact that facilitates communication and creates a shared understanding of the organization's strategy among the employees. The centralized platform with standardized action cards helps convey the strategic plan and the importance of specific actions to be taken. This shared understanding fosters a sense of ownership of the strategy among the employees and a commitment to aligning their behaviors with the strategy.

Employees are empowered to take specific actions aligned with the organization's positive-impact strategy. By allowing employees to suggest new actions, become involved in driving various subjects and participate in strategic conversation, the platform encourages active and inclusive involvement. This involvement and empowerment contribute to a stronger organizational commitment as employees feel more connected to the strategy and its implementation.

The open strategy approach, which is supported by the platform, emphasizes transparency and inclusion in the strategy formulation and implementation processes. This openness fosters a sense of trust and commitment among employees as they feel included in the decision-making and implementation processes.

By involving a significant number of employees in the platform and encouraging collective buy-in for the strategy, the platform helps develop a shared strategic vision. This shared vision informs how the employees make sense of the strategy and encourages them to align their behavior better with the strategy, thereby leading to higher levels of commitment among them.

The platform, as a material artifact, plays a role in shaping strategic practices within the organization. It functions as a boundary object that mediates social interactions and contributes to the formation of shared meaning. Negotiations over the use and interpretation of actions and information on the platform influence the process of strategy implementation and organizational commitment.

In summary, the implementation platform, as a material artefact, enhances organizational commitment in strategy implementation by promoting effective communication, empowering employees, providing guidance, fostering transparency and inclusion, facilitating collective buy-in and shaping strategic practices. Its affordances contribute to creating a strong sense of commitment among the employees to execute the strategic plan and support the organization's goals.

f) Connectors.

When the different elements (the documentary, workshop, and card game) had been produced and after receiving the go signal from top management and from the top 30 company leaders, the organizing team began thinking about how to organize the deployment of the workshop throughout its various BUs. As a result, 'impulse circles' were created.

The piloting committee identified several people throughout the building process and planned to rely on some of them and on the network of CSR leaders in their BUs. They identified general ambassadors as "master connectors". A minimum of one person from each BU was supposed to assume the position of 'master connector' to set up the workshop. The general managers of the BUs selected the 30 master connectors after undergoing the workshop for the first time. People who had a specific level of subject sensitivity (and connected corporate

responsibilities, such as Human Resources or CSR) were considered in selecting the master connectors. The master connector's job was to identify relays for spreading the documentary's vision across the BU and to train them in workshop facilitation.

Now it's your job to identify [connectors] and coordinate [with them] using all the tools we've shown you. Plan the distribution of this [the workshop, movie and card game] between September and June, so that all the staff may join you on this adventure. [INT45](#)

The master connectors then designated several connectors inside their respective BUs and gave them relatively privileged positions as transmitters, spokespeople, and facilitators of the company's strategy. In a classic strategy implementation scenario, the CEOs, the top 1,000 executives and the department heads, among others, play these roles, but this time the ones who played these roles were the connectors, who occasionally included store managers and particularly motivated lower-level employees. The strategy used in one BU was to phone each shop and recruit one or two people to build a network of connectors, and people who had an interest in the topics raised by the new strategy, whether they had previously expressed their interest in it or had not, volunteered. Consequently, a group of almost a thousand volunteer employees was established, who helped with the distribution, creation, and transmission of the workshops.

From a sociomaterial perspective, the concept of 'connectors' and their role in the deployment of the workshop and strategy implementation can be analyzed in terms of how human and material elements interact to shape social practices and organizational outcomes. The workshop, documentary and card game are material artefacts that act as boundary objects. They serve as intermediaries between different groups within the organization, thereby enabling communication and creating shared meaning. Connectors play a crucial role in using these

artefacts to facilitate the transmission and dissemination of the company's strategy across various BUs.

The workshop toolkit, in the hands of the master connectors, becomes a material resource that shapes the social practices of planning, coordination and distribution. The connectors utilize the tools provided to identify relays and train facilitators, thereby shaping the strategy implementation process through their interactions with these material artefacts.

As mentioned earlier, in the aforementioned sociomaterial context, the traditional roles of CEOs, top executives and department heads as strategy implementers are hybridized. The connectors—who could be store managers or lower-level employees—now take on the roles of transmitters, spokespeople, and facilitators. This reveals how the interplay of human agency and materiality allows for the reconfiguration of roles in the strategy implementation process. The connectors and their role in spreading the organization's strategic vision featured in the documentary exemplify the emergent nature of sociomaterial practices. The process of selecting and designating connectors emerges as a response to the need for the effective distribution and transmission of the strategy. These roles are enacted and negotiated through interactions with material artefacts and other human actors.

The connectors and their network of relays represent a form of distributed agency. Strategy implementation is not solely dependent on top management or a select group of individuals; instead, agency is distributed across a network of connectors and their collaborators who actively participate in the implementation process. The workshop, documentary, and card game play roles in engaging employees and encouraging them to become actively involved in the strategy implementation process. These material artefacts create emotional connections, foster commitment, and inspire employees to take ownership of the strategic plan, thereby enhancing

their engagement in strategy implementation. Thus, connectors play a critical role in building and maintaining relationships within and between BUs. By identifying relays and facilitating communication, they enhance connectivity and foster a sense of togetherness among the employees, thereby contributing to a more cohesive strategy implementation process.

Overall, from a sociomaterial perspective, the concept of ‘connectors’ highlights the intertwined nature of human and material elements in the implementation of a company’s strategy. The connectors function as mediators between material artefacts and social practices, shaping the implementation process and contributing to the development of organizational commitment and engagement. The distribution and transmission of the workshops demonstrate the distributed agency and the emergence and hybridization of roles that can occur in a sociomaterial context.

6.2.5 Conceptual Interpretation

The analysis, which was the final step in the process of generating a grounded understanding, indicated that knowledge, ability, and willingness (aggregated dimensions) are important for developing and retaining organizational commitment to strategy implementation.

The aggregated dimension ‘knowledge’ refers to the comprehensive and integrated understanding, learning and collective intelligence cultivated within an organization to support the successful implementation of the strategic plan and drive cultural transformation. It encompasses the acquisition, dissemination and application of information, insights, and skills by employees to develop a shared understanding of the strategic plan and foster a collaborative and learning-oriented culture.

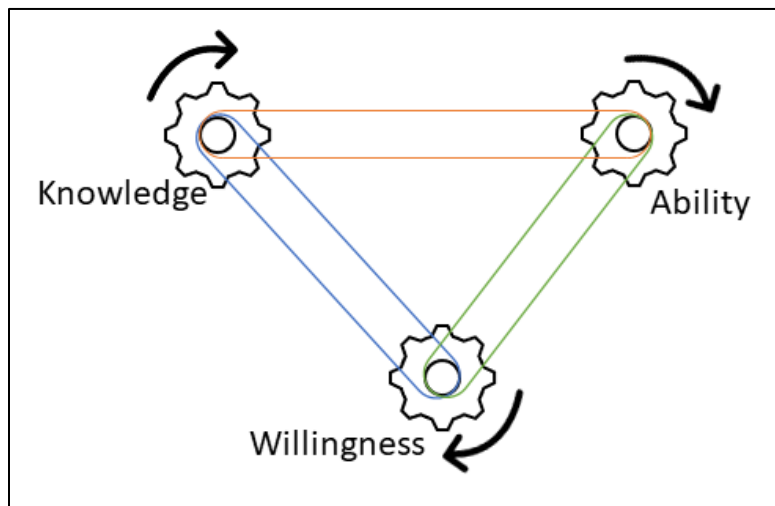
The aggregated dimension “ability” refers to the organization’s capacity and capability to effectively implement a strategic project by leveraging three key elements: belongingness, adaptability, and legitimacy. It encompasses the collective skills, competencies and resources that enable employees to work cohesively, adapt to changing circumstances and align their actions with the project’s values and goals.

The aggregated dimension ‘willingness’ refers to the intrinsic motivation and enthusiasm demonstrated by employees in their active participation in strategy implementation. It encompasses the development of capable leaders who foster a cohesive and motivated workforce, the recognition of employees’ contributions and achievements, the encouragement of healthy competition to drive a positive impact and the empowerment of individuals to take action and achieve the organization’s strategic goals.

The interplay between knowledge, ability and willingness is crucial for the successful implementation of strategies and the achievement of organizational objectives. These three elements are interconnected and mutually reinforcing, thereby creating a dynamic synergy that drives positive outcomes in an organization ([Error! Not a valid bookmark self-reference.](#)).

Figure 13

The Three Components of Organizational Commitment



Knowledge provides the foundation for ability. When employees possess the necessary knowledge and understanding of the strategic plan, goals and required actions, they are better equipped to perform effectively. Knowledge empowers individuals to develop the skills and competencies required to execute a strategy, such as technical skills, problem-solving abilities and communication and leadership skills. Ability, in turn, enhances knowledge. When employees actively apply their skills and competencies to strategy implementation, they gain practical insights and real-world experience, which refine their knowledge and deepen their understanding. The combination of knowledge and ability fosters a culture of continuous learning and improvement. As employees apply their knowledge, they learn from their successes and failures, which further enhances their ability to adapt and respond to changing circumstances. The cogwheel labeled “Knowledge” represents the initial stage, where individuals gain an understanding of the strategic plan and acquire relevant information and skills for strategy implementation.

Ability influences willingness. When employees feel confident about their skills and capabilities, they are generally more willing to take on challenging tasks and actively participate in strategy implementation. Recognizing and acknowledging employees' abilities can empower and motivate them and make them want to contribute further. When individuals see that their skills are valued and contribute to an organization's success, they are likely to be willing to invest greater effort. Empowering employees by giving them decision-making autonomy and providing them with the resources they need to execute their responsibilities will amplify their sense of ownership and accountability, thereby increasing their willingness to take the initiative. The cogwheel labelled "Ability" symbolizes the development of skills and competencies as a result of acquiring knowledge. As this cogwheel turns, it becomes interconnected with "Knowledge," thereby indicating that increased ability enhances and reinforces knowledge acquisition.

Willingness drives the application of knowledge. When employees are motivated and willing to contribute, they actively seek opportunities to apply their knowledge and skills in the strategy implementation process. A strong sense of willingness fosters a collaborative and participatory environment in which employees share knowledge and learn from one another. This enhances collective learning and creates a feedback loop that further enriches knowledge. Employees' willingness to embrace change and adapt to new situations encourages continuous learning. Those who have this willingness are likely to seek out new knowledge, explore innovative approaches and stay up-to-date with the latest developments to enhance their ability to contribute effectively. The cogwheel labelled "Willingness" represents the motivation and enthusiasm to actively participate in strategy implementation. This cogwheel is interconnected with both 'Knowledge' and 'Ability', thereby indicating that willingness drives continuous

learning and the further development of abilities and knowledge. As the wheels turn and interact with each other, they create a cyclical motion, thereby showcasing the ongoing and interconnected nature of knowledge, ability, and willingness in strategy implementation. The cogwheel representation highlights how the engagement of these elements forms a dynamic cycle that fuels continuous growth and improvement in strategy execution. The interlocking nature of the cogwheels symbolizes the synergy between knowledge, ability, and willingness, emphasizing the importance of a balanced and integrated approach to achieve successful outcomes. As the cycle perpetuates, the organization can adapt and evolve, continually improving its capacity to effectively implement strategies and achieve its objectives.

In summary, knowledge, ability, and willingness are interconnected and mutually reinforcing aspects that create a virtuous cycle in strategy implementation. When organizations foster a culture of learning, empowerment and recognition, employees are likely to develop their abilities and be willing to contribute and actively participate in driving positive outcomes. This interplay forms the basis of a dynamic and adaptive organizational culture that can enable the organization to effectively implement strategies and thrive in a rapidly changing business environment.

6.2.6. Discussion

First, the present chapter provided an answer to a recent call for more research on the materiality of strategy work as part of implementation, examining the tools and frameworks mobilized or created for activities in strategy work (Friesl et al., 2021, p. 27). By analyzing the various artefacts developed and used in an organization's strategy implementation, the study illustrated how the artefacts impact strategy implementation among employees. Thus, this shows

how sociomateriality contributes to describing not only how practices are implemented but also how they “serve to construct the phenomena they address” (Jones, 2014, p. 921).

The present chapter, in which the concept of sociomateriality was central, revealed that material artefacts are not passive entities but active agents that influence the implementation process. These artefacts function as mediators, shaping interactions and interpretations and guiding employees towards a shared understanding of the strategic plan. The focus of the study on the role of materiality in strategy implementation aligns with the idea that strategy implementation is a dynamic, iterative, and complex process involving various activities by both managers and employees to turn strategic plans into reality and achieve strategic objectives (Yang et al., 2010). The emphasis of the study on material artefacts—such as communication materials and digital platforms—acting as active agents that shape interactions and interpretations demonstrates a performative perspective on strategy (Merkus et al., 2019). It shows how these material artefacts contribute to the active enactment of strategy by organizational actors as they use these tools to reshape reality and align it with the desired strategic direction. Thus, the study’s findings illustrate that the practice of ‘reshaping’ reality through material artefacts is crucial for effectively implementing a strategic plan and achieving the intended outcomes.

For example, visual aids, communication materials and digital platforms serve as boundary objects, thereby facilitating communication and collaboration among different groups within the organization. They enable employees to construct a common roadmap for behavior and actions, helping them align their individual efforts with the overall strategic goals. This illustrates that the materiality of strategy work goes beyond providing a mere toolkit for implementation; instead, it actively constructs the implementation phenomena. The use of

artefacts shapes the sensemaking processes of individuals and groups, thereby influencing their actions and decisions during the implementation phase.

The successful implementation of a strategic plan relies heavily on the sensemaking processes of both individuals and groups within an organization. While managers are generally acknowledged to have some influence over these sensemaking processes among their subordinates, the control they can exert is limited. This limitation stems from the fact that implementation is a complex and dynamic process influenced by various factors, including the diverse perspectives and interpretations of the individuals involved (Friesl et al., 2021). However, this study revealed a promising avenue for exerting a certain degree of influence over the sensemaking process during the implementation phase through the use of artefacts.

Artifacts—such as physical tools, visual aids, and communication materials—play a crucial role in mediating social interactions and shaping the meaning-making processes of individuals and groups. According to Mitev et al. (2018), although information stored in material things does not possess a voice of its own, it can still impact the behaviors of individuals. In the context of strategy implementation, artefacts act as boundary objects and facilitate communication and understanding among different groups within the organization. They carry meaning and intention, guiding employees towards a shared understanding of the strategic plan and its objectives, thereby complementing the perspective that middle managers interpret what they should be doing not only through social interactions (Balogun & Johnson, 2005) or interpersonal managerial actions (Tawse & Tabesh, 2021) but also through the material objects that constitute the strategic process.

While managers may not have complete control over individual sensemaking, they can strategically employ artefacts to influence the interpretation of initiatives during the

implementation phase. By designing and disseminating artefacts that align with the organization's desired strategic direction, managers can create a consistent narrative and promote a shared understanding of the goals and actions required.

Furthermore, artefacts can enhance the sense of belongingness and legitimacy within an organization. By incorporating elements that reflect the organization's culture and values into artefacts, managers can foster a sense of identity and pride among employees. This sense of belongingness can encourage employees to identify with the organization's strategic objectives and to feel a personal stake in their successful implementation. Artefacts also contribute to the ability dimension of organizational commitment by providing employees with tangible tools and resources to execute the strategy.

However, it must be pointed out that artifacts can only partially enable managers to influence the sensemaking process. They are not a panacea for all problems related to implementation. The interpretation of artefacts can still be subject to individual and group biases, and the meanings assigned to them may evolve as the implementation progresses. Therefore, managers should complement the use of artefacts with other communication and engagement strategies to reinforce the desired sensemaking and commitment among employees. It is also crucial to recognize that artefacts are not substitutes for effective leadership and communication. They should be used as part of a comprehensive approach that considers the diverse perspectives and interpretations of the individuals and groups involved in the strategy implementation process. Ultimately, by recognizing the value of artefacts in influencing sensemaking, organizations can enhance their ability to implement strategies successfully and achieve their strategic goals.

Hrebiniak (2006) proposed that having a clear model of strategy implementation can greatly help managers guide the process, make critical decisions, and understand the rationale behind putting the strategic plan into action. The present study went beyond the conventional focus on formal plans and strategies and shed light on how various material artefacts play a pivotal role in building a common roadmap of behavior and actions that employees can commit to during the implementation of the organization's strategy.

The strategy implementation phase is often characterized by a dynamic and iterative process that requires adaptability and flexibility (Yang et al., 2010). While the strategic plan provides the overall direction, it is the material artefacts that translate the abstract concepts into tangible and actionable steps. These artefacts act as boundary objects, facilitating communication, collaboration and a shared understanding among different groups within the organization (Spee & Jarzabkowski, 2009). They create a common language and framework that guide employees in their strategy implementation efforts and in aligning their behaviors with the organization's strategic goals.

The unplanned emergence of tools and frameworks during the strategy implementation phase highlights their significance as cornerstones in the successful execution of the strategy (Vilà & Canales, 2008). These tools and frameworks provide practical guidance and structure to employees, thereby enabling them to navigate the complexities of implementation with greater confidence and clarity.

Moreover, material artefacts help foster employee flexibility, which is a crucial attribute required to adapt and respond to changing circumstances during strategy implementation. As strategy implementation unfolds, unforeseen challenges and opportunities may arise, thereby necessitating adjustments to the original plan (Heracleous & Jacobs, 2008). The utilization of

material artefacts helps employees remain agile and open to modifying their behaviors so that these will continue to be aligned with the organization's overarching strategic vision. Furthermore, the role of material artefacts extends beyond the individual level and fosters collective flexibility and coordination among teams and departments. As different groups interact with these artefacts, they gain insights into each other's perspectives and roles, thereby promoting collaboration and a unified effort towards strategic goals.

The present study highlighted the dynamic interplay between formal planning and the tangible tools provided by material artefacts. While the strategic plan outlines the overall direction and vision, it is through the materiality of artefacts that employees gain a concrete understanding of how to put the plan into action (Leonardi, 2015). The use of visual aids, charts and frameworks enhances the communication and dissemination of information and helps employees internalize the organization's strategic objectives and their roles in achieving them. Thus, the study emphasized the significance of material artefacts as instrumental tools in the implementation phase of an organization's strategy. While a clear model of implementation provides valuable guidance to managers, the materiality of artefacts enriches the process by providing tangible tools and frameworks that build a common roadmap for employees to commit to during strategy implementation. These artefacts promote flexibility, coordination, and a shared understanding, thereby facilitating the alignment of individual and collective efforts with the strategic goals. As such, they play a vital role in enhancing the organization's capacity to navigate the complexities of strategy implementation and achieve successful outcomes.

Strategic planning has evolved beyond the traditional notion of merely producing plans. In contemporary business contexts, the true purpose of strategic planning is to actively engage executives in the decision-making process for the year ahead and to cultivate their strategic

thinking skills (Vilà & Canales, 2008). This shift in perspective emphasizes the importance of lower-level employee involvement and leadership in shaping the strategic direction of the organization. Lower-level employees are not just passive recipients of plans; instead, they play an active role in crafting and refining the strategic vision, thereby ensuring its alignment with the organization's goals, providing the necessary resources for successful implementation, and for engaging in simultaneous planning and doing (Hrebiniak, 2006).

Building upon the aforementioned idea, the second significant contribution of the present study lies in recognizing the critical role of organizational commitment during the implementation phase. While having a strategic plan in place is essential, it cannot by itself guarantee successful implementation. Merely providing employees with knowledge regarding the strategy is not sufficient to foster commitment and drive action towards its realization. Organizational commitment is the force that binds employees to the organization's strategic objectives and motivates them to actively contribute to their achievement (Tawse and Tabesh, 2021).

During the strategy implementation phase, employees face various challenges and complexities that can hinder their commitment to the strategic plan. These challenges may include resistance to change, conflicting priorities, lack of clarity of the plan and the need to adapt to unforeseen circumstances. Organizational commitment becomes a critical factor in overcoming these obstacles and remaining focused on the organization's strategic goals.

Organizational commitment is nurtured through a combination of factors, including knowledge, ability, and willingness. When employees are actively engaged in the strategic conversation and decision-making process, they develop a sense of ownership of the strategy and a sense of responsibility for its success (Stieger et al., 2012). Involving employees in strategy

formulation fosters a shared understanding of the plan and encourages them to align their individual actions with the collective vision.

As mentioned earlier, strategic planning is no longer limited to producing static plans; it should actively involve executives in shaping the organization's strategic direction and enhancing their strategic thinking skills. However, the successful realization of the strategic plan depends on the employees' organizational commitment during the implementation phase. Their mere knowledge of the strategy is insufficient to drive commitment; instead, organizations must foster a culture of involvement, recognition, and support to engage employees and encourage their active participation. By building organizational commitment, organizations can overcome implementation challenges and empower employees to execute the strategy effectively, ultimately leading to the achievement of the organization's strategic objectives.

One of the key issues regarding open strategy lies in its potential implications for organizational commitment during strategy implementation. While open strategy emphasizes inclusion and participation, it may inadvertently lead to a diffusion of responsibility and accountability. In organizations where decision-making authority is shared by many stakeholders, it is challenging to hold individuals accountable for the outcomes of the strategic plan. This diffusion of responsibility can hamper individuals' commitment to the execution of the strategy as they may feel disconnected from the decision-making process and less invested in its success.

It is essential to recognize that commitment does not rely solely on the level of participation or inclusion. Commitment is a complex interplay of various factors, including the alignment of individual and organizational goals, the perception of a meaningful and compelling vision and the provision of adequate resources and support. While open strategy may enhance

employees' knowledge and skills through participation, commitment cannot be achieved only through the diffusion of knowledge. True commitment stems from a sense of purpose and ownership, which requires a clear understanding of how one's individual efforts contribute to the organization's overall success.

Moreover, the willingness to participate and take the initiative in strategy implementation should be carefully balanced. While empowerment is important, organizations must also maintain a level of accountability and direction to ensure that strategic initiatives align with the organization's objectives. Overemphasizing willingness without putting appropriate checks and balances in place may lead to ad hoc decision-making and a lack of focus on strategic priorities.

In conclusion, the intersection between open strategy and organizational commitment presents both opportunities and challenges for strategy implementation. While open strategy can promote transparency, inclusion and collaboration, its practical implementation requires careful consideration of its potential implications for organizational commitment. Organizations must strike a balance between participation and accountability, thereby fostering a culture that values a diversity of perspectives while maintaining a clear sense of direction and purpose. The successful use of open strategy requires thoughtful and purposeful engagement with all stakeholders, leveraging their expertise and commitment to drive positive outcomes in strategic execution. Ultimately, the interplay between open strategy and organizational commitment is a dynamic process that requires continuous refinement and adaptation to achieve successful strategic outcomes.

6.2.7. Conclusion, Limitations, and Future Research Agenda

The strategy implementation phase investigated in the present study offers an interesting perspective due to the distinct tools and frameworks involved. The present study stands out by delving into the material aspects of various artefacts utilized during the implementation of the newly developed strategic plan. In doing so, it not only validated the existing hypotheses of scholars but also demonstrated how interconnectedness and interdependence among knowledge, ability and willingness are essential for nurturing and maintaining organizational commitment during strategy implementation.

The present study effectively illustrated the tangible impact of carefully designed artefacts on strategy implementation by promoting knowledge acquisition, appropriation, and empowerment among employees. The workshop, a central tool in the case study, effectively conveys the documentary's message, fosters collaboration, and nurtures commitment within a diverse workforce. While it encourages the participants to translate their commitment into actions, continual evaluation and feedback are crucial for gauging its lasting influence on organizational behavior and outcomes.

Moreover, understanding how material artefacts such as a card game shape social interactions and communication can empower organizations to craft more effective communication strategies. By harnessing the power of materiality, such artifacts can cultivate employees' organizational commitment, thereby driving successful strategy implementation.

The application of the open strategy approach to strategy implementation has shown success, aligning with the concept that strategic achievement requires harmonizing planning and execution (Hrebiniak, 2006). This success emphasizes the potential of the open strategy paradigm to skillfully navigate the intricate process of strategy implementation.

Finally, the tools and frameworks developed for the implementation phase present exciting opportunities for future research in strategy gamification. Exploring how to gamify strategy implementation or even strategy formulation could yield valuable insights in the realm of open strategy research. Thus, these pathways offer new avenues for enhancing our understanding of strategy dynamics and execution.

Chapter 7: General Discussion and Conclusion

The three previous chapters each presented and developed a standalone article, constituting the core of this thesis. This seventh chapter first focuses on describing how the three articles developed in this thesis are interconnected and build up towards a unified analysis of open strategy dynamics. The four overarching contributions of the thesis are (1) an alternative vision of inclusion in open strategy, (2) navigating the complexities of CSR and open organizing, (3) the material aspect of open strategy, and (4) rethinking open strategy: Moving beyond inclusion toward alignment and continuity are discussed. Furthermore, I provide in this chapter several managerial contributions and discuss the limits of this thesis and the future research agenda. Finally, the chapter ends with a conclusion and summary of the overall key points of this thesis.

7.1. Summary of the Contributions of the Standalone Articles and Their Interconnectedness

7.1.1. Summary of the Three Standalone Articles

While the contributions of each individual paper to their specific literatures are evaluated in the papers themselves, I provide a summary ([Table 10](#)) below before moving on to the general discussion of this thesis.

The first article provides a comprehensive overview of open strategy by synthesizing existing research and theories in the field. It extends previous work by examining the potential downsides of stakeholder engagement in open strategy and introduces three key constructs (structure, purpose, and neutrality) to mitigate negative impacts. The article contributes to the open strategy literature and aligns with discussions on inclusivity and democratization in strategic processes. Additionally, it highlights the importance of facilitation skills in open strategy, suggesting that facilitators play a crucial role in enhancing inclusion, participation, and democracy in stakeholder engagement. This aligns with the evolving expectations for the strategy profession, which increasingly values organizational skills over traditional analytical ones.

The second article highlights the importance of trust, significance, and temporality in enhancing participant inclusion in open strategy processes. Trust is crucial for authentic engagement, significance recognizes individual contributions, and temporality structures the process effectively. These dimensions work together to create an inclusive and transparent environment for successful strategy initiatives. The study also emphasizes the significance of

psychological safety, qualitative inclusion, and balanced involvement to foster a sense of belongingness and authenticity among participants, ultimately enhancing inclusion.

The third article examines the strategic implementation phase and highlights its uniqueness in using various tools and frameworks. It emphasizes the importance of interconnectedness between knowledge, ability, and willingness in fostering organizational commitment during strategic implementation. Specifically, the research focuses on how well-designed artifacts, like workshops and card games, impact strategy implementation by promoting knowledge acquisition, collaboration, and commitment among employees. The study suggests that continual evaluation and feedback are essential to measure the long-term effects of these artifacts. Additionally, it discusses how material artifacts can shape social interactions and communication, enabling organizations to develop more effective communication strategies and enhance organizational commitment.

Table 10

Summary of the Contributions of Three Articles

Article	Research question	Concepts	Contributions
Article 1	How can organizations manage the complexity of stakeholder engagement and openness in their strategy-making processes?	Complexity, openness, and facilitators	Importance of facilitators to guide processes through structure, purpose, and neutrality
Article 2	How can organizations foster participant inclusion in an open strategy process?	Inclusion, sense of belongingness, and sense of authenticity	Importance of trust, the sense of significance, and temporality in fostering inclusion
Article 3	How does materiality support organizational commitment in the implementation phase of strategy?	Strategy implementation, organizational commitment, and materiality	Importance of artifacts to support knowledge, ability, and willingness and foster engagement

7.1.2. Bridging the Findings of the Three Standalone Articles

The research field and the three articles developed in this thesis have enabled to put forward multiple discussion points and results that are interconnected and are summarized below and presented in [Figure 14](#).

First by highlighting that the concept of “open strategy” is not only a process of involving stakeholders but also entails a multidimensional complexity that permeates the different phases of strategic development and implementation. This complexity is not limited to the interactions between various stakeholders but also encompasses the intricate interplay of transparency, inclusion, materiality, and commitment throughout the strategic journey. The articles collectively underscore that effectively managing this complexity requires not only specific tools and techniques (Articles 1 and 3) but also a nuanced understanding of trust (Article 2), facilitation (Article 1), and the dynamic relationships between different elements involved in open strategy processes (Article 1, 2 and 3).

Then by revealing that the intricate nature of open strategy and the need for organizational adaptation and purposeful tools is also important. Collectively, the articles illustrate the intersection of organizational complexity and specialized tools in the journey of successful open strategy, where organizations must adapt their structures (Articles 1 and 2) and employ purposeful tools (Articles 2 and 3) to navigate the complexities and orchestrate strategic adaptation.

Moreover, the journey through these articles unveils a holistic approach to open strategy. It is a landscape where complexity is acknowledged, facilitation functions as a compass (Article 1), trust forms the bedrock (Article 2), and commitment fuels progress (Article 3).

Organizations embracing open strategy must adeptly balance these elements to foster an environment in which stakeholders are engaged, transparency is maintained, and strategies are executed with dedication and unity. The synthesis of these articles paints a comprehensive picture of the intricate web of open strategy and offers actionable insights for organizations venturing into this dynamic realm.

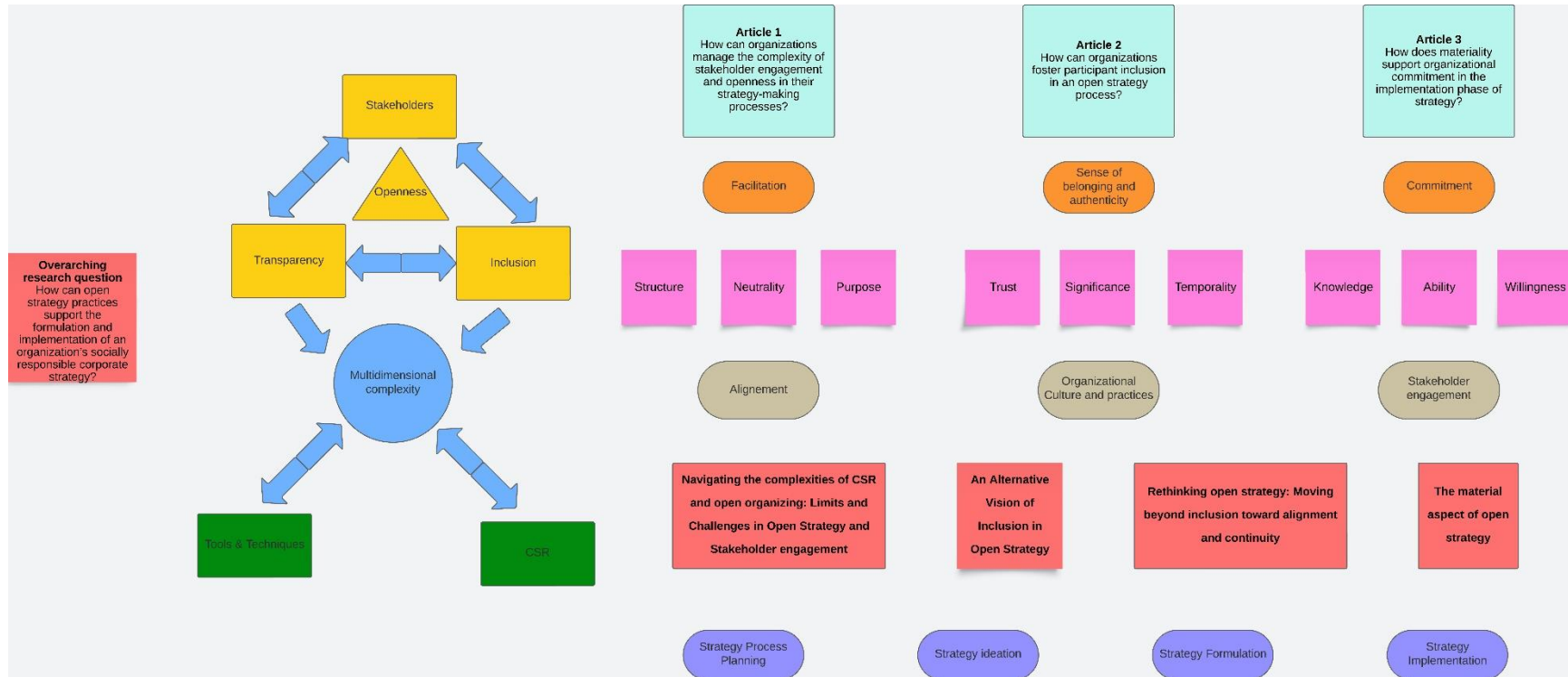
The collaboration among the elements of facilitation (Article 1), trust-building (Article 2), and connector roles (Article 3) enhances the effectiveness of open strategy, thereby leading to more successful implementation outcomes; these should not be looked at in isolation but rather as interdependent components of a comprehensive approach to managing complexity, fostering inclusivity, and ensuring commitment throughout the open strategy process.

Additionally, this thesis shows that the interplay between transparency and inclusion within the context of open strategy is a complex and nuanced relationship explored in two articles. Article 2 investigates how transparency and exclusion can paradoxically enhance the perception of inclusion, challenging conventional thinking. Article 3 complements this by emphasizing the role of material artefacts as tangible mediators of transparency, thereby fostering a sense of belonging and involvement even for excluded stakeholders. Together, these insights reveal that transparency goes beyond information dissemination and shapes an inclusive atmosphere in which stakeholders feel connected and engaged through accessible tools and information. This multifaceted dynamic highlights the potential for organizations to create a more inclusive strategic environment through thoughtful management of transparency and material artefacts.

Finally, the thesis reveals that openness alone is not sufficient; it must be complemented by thoughtful structuring (Article 1) and inclusive engagement (Articles 2 and 3) to ensure that the strategy is effectively executed. Organizations aiming for successful strategy implementation should carefully navigate the interplay between embracing openness and maintaining structured execution. By striking this balance, organizations can harness the collective power of stakeholder engagement and internal commitment to translate strategic intentions into tangible results.

Figure 14

Summary of Thesis



The above figure presents the overall research questions, concepts, contributions, and discussions of the thesis. Reading from left to right, the overarching research question, its contributions and discussion are materialized through the coral boxes. Moving to the right of the first box in the figure multiple shapes represent the various concepts that led to defining the overall research question and the linked sub-research questions of the three standalone articles. In yellow the concepts that define open strategy, in green the elements that have been identified as core elements of the research setting with arrows showing their relations between each other and with the central element of multidimensional complexity (blue circle). The figure then summarizes the three standalone articles developed in this thesis, with their individual research questions (light blue boxes), core topic addressed (orange bubbles), and contributions (pink boxes). The three articles follow the strategy process from planning to implementation (purple bubbles) and brought to light important findings that were either discussed theoretically or empirically (beige bubbles).

7.2. Contributions of the Thesis to an Alternative Vision of Inclusion in Open Strategy

In recent years, the concept of open strategy has gained significant attention as a means to confront conservatism and foster positive change in organizations. Seidl et al. (2019a) propose that effective strategies for this purpose should begin with identifying the right individuals to mobilize and empowering them appropriately. While this idea may appear promising, it is important to recognize its limitations. Identifying the right individuals can be a complex and subjective task, thereby leading to potential biases in the selection process. Moreover,

empowering individuals may raise concerns regarding power dynamics and decision-making processes within the organization (Hautz et al., 2017).

The definition of inclusion presented by Jansen et al. (2014, p. 373) as being “the degree to which an individual perceives that the group provides him or her with a sense of belonging (group membership and group affection) and authenticity (room for authenticity and value in authenticity).” is an intriguing one. However, it is essential to recognize the nuances of inclusion and not limit it solely to participation or the absence of exclusion. As revealed in this thesis, inclusion should go beyond merely giving stakeholders a sense of belonging and authenticity within a group (Jansen et al., 2014). It should also involve creating an environment that actively values and supports stakeholders, thereby allowing diverse perspectives and identities to flourish (Edmondson, 2018). Implementing such a nuanced understanding of inclusion may present practical challenges, as it would require the transformation of processes and practices within the organization, particularly in organizations with deeply ingrained cultural norms and practices. As shown in this thesis, in article 1, the role of facilitators is brought forward as being essential in managing open processes and guaranteeing transparency and inclusion. Articles 2 and 3 have shown that open strategy requires creating zones of inclusion through engaging continuously with various stakeholders and through different forms. Doing this requires a lot of resources and planning and can thus be challenging.

Transparency is often considered a foundation of openness in organizations (Splitter et al., 2023), and it plays a crucial role in the successful implementation of open strategies. However, it is essential to recognize that transparency alone may not be sufficient. While transparency can provide valuable insights and information, it may not guarantee that marginalized voices are heard and respected in the decision-making process (Dobusch et al.,

2017). Achieving genuine inclusivity in decision-making requires deliberate efforts to dismantle hierarchies and power imbalances.

This thesis highlights the importance of corporate culture and multi-stakeholder participation models in maximizing the benefits of open strategy initiatives. While corporate culture can foster an environment of openness and authenticity, it can also hinder change and innovation if it becomes overly conservative or resistant to new ideas. Similarly, multi-stakeholder participation models can enhance inclusivity, but they may also slow down decision-making processes, particularly in complex organizations with diverse interests.

The alignment of open strategy principles with stakeholder engagement and CSR objectives is promising, as it can lead to more ethical and sustainable strategies as shown in this thesis through the case study developed in articles 2 and 3. However, it is essential to recognize that open strategy is not a one-size-fits-all approach. Different stakeholders may have conflicting interests and addressing their concerns may pose significant challenges. Striking a balance between stakeholder engagement and the need for decisive action is critical in the pursuit of open and sustainable strategies.

The discussion around open strategy, inclusion, and transparency presents exciting opportunities for organizations to challenge conservatism and create positive change. However, it is essential to navigate the inherent complexities and limitations associated with these concepts. Implementing open strategy processes effectively requires careful consideration of power dynamics, cultural norms, and stakeholder interests. While openness, inclusion, and transparency are essential components of progressive strategies, they should be complemented with thoughtful and context-specific approaches to achieve meaningful and sustainable outcomes. Article 2 has shown how HomeCo has been able to create a deep organizational

culture over more than thirty years, which laid out the foundations for a successful open strategy process. In a different context the results of this study might have been very different, where more resistance might have been met with a more closed organizational culture. Article 3 also brings forward several artifacts that have been specifically developed for the implementation phase of the strategic process. Here again it is not possible to say that developing a movie, a card game and a workshop around those elements is replicable to other organizations, whilst expecting the same outcomes as were found at HomeCo. The subtlety of open strategy processes lays in the paradox that they need be flexible and highly structured at the same time, which underlines the findings of article 1 that emphasizes the need for facilitators guiding and co-designing the process, providing structure, neutrality and purpose.

7.3. Contributions of the Thesis in Navigating the Complexities of CSR and Open Organizing: Limits and Challenges in Open Strategy and Stakeholder Engagement

7.3.1. Building CSR Alignment Throughout an Organization with Open Strategy

There is no denying the rising importance of CSR in today's corporate world. In addition to making a profit, businesses must now reveal they care about people and the planet. By emphasizing openness, transparency, and cooperation among stakeholders, open organizing through open strategy offers a promising means to support CSR-oriented plans, with the potential to provide more efficient and socially responsible strategic outcomes as this thesis shows through the presented case study in articles 2 and 3. Despite the widespread acceptance of CSR and stakeholder involvement, it is important to recognize their complexities and limitations.

CSR seeks to effect change beyond monetary benefit by recognizing and responding to the effects that businesses have on communities and the environment (triple bottom line (Elkington, 1977)). By including more people in the decision-making process, open organizing and open strategizing can improve alignment with CSR goals. The difficulties encountered by different groups may be better understood and new, creative solutions can be developed if more people are brought into the conversation (Seidl et al., 2019a). However, firms may find it difficult to strike a balance between economic, environmental, and social imperatives under this notion, particularly in fields where these objectives appear at odds with one another. Additionally, conflicts between short-term profit-driven decisions and long-term socially acceptable activities may arise when prioritizing shareholder over stakeholder expectations.

However, it is vital to acknowledge the limits and constraints of efficiently adopting CSR and open organizing. More refined methods are required to manage the complexities of stakeholder interactions. Certain businesses may have trouble successfully including stakeholders in decision-making processes because of the difficulty of implementing formal stakeholder engagement frameworks. Moreover, adopting extensive CSR policies may be too costly, if not impossible, for certain organizations, particularly smaller ones or those in industries with substantial competition. While it is essential for businesses to include their stakeholders, there may be limits to how much they can do so.

The execution of CSR activities may also be more cosmetic than meaningful, with certain companies engaging in “greenwashing” or “cause-washing.” This is the strategy of bolstering one’s public image via the use of false claims or superficial displays of social responsibility rather than committing to substantive reforms. It is crucial to examine whether businesses are

actually integrating CSR concepts into their fundamental goals or are merely utilizing it as a marketing ploy.

7.3.2. Finding the Balance Between Engagement and Embeddedness

Open planning and including all interested parties, as shown in this thesis and particularly through the case study developed in Articles 2 and 3, are recommended as solutions to these problems. Companies may better understand their stakeholders' demands, adapt their strategies to meet those demands, and produce more ethical results if they collaborate with them in an open and honest manner. However, there are certain restrictions to this method.

To begin with, the trend toward transparency in today's societies and businesses is a recent development (Splitter et al., 2023). Certain businesses may be averse to this change because of worries about public perception or the disclosure of proprietary information (Hautz et al., 2017). It might be tricky to find the sweet spot between transparency and strategic secrecy. Second, it is possible that not all voices will be heard even if engagement with stakeholders is encouraged (Dobusch et al., 2019). Decision-making procedures may not accurately reflect the variety of stakeholder opinions if certain marginalized or underrepresented groups have trouble having their voices heard (Dobusch & Kapeller, 2018). Another important consideration is providing employees with the resources they require to make meaningful contributions to CSR efforts. Even if CSR is generally well received, its impact on employees at the grassroots level should not be overlooked. The beneficial effects of CSR on society and the environment may be hampered if companies fail to consider their employees viewpoints and provide them with incentives.

Furthermore, open organizing and stakeholder participation may have both positive and negative effects. While it is important to hear from everyone, doing so too frequently might slow down the decision-making process and even lead to conflicts of interest (Hautz et al., 2017). It is a difficult management task to find a happy medium between accommodating the needs of stakeholders and preserving the organization's long-term goals and objectives. The absence of uniform standards for CSR and stakeholder involvement is another barrier. While the articles in this thesis present a few frameworks and guidelines (integrating facilitators in the organization and professionalizing their roles within strategic processes as argued in Article 1, creating zones of inclusion through spaces and platforms—such as the stakeholder consultation as shown in article 2, developing artifacts consciously and taking into account their agency as presented in article 3), there is no one-size-fits-all solution. Identifying universally applicable best practices can be difficult since different sectors, geographies, and stakeholders may necessitate tailored approaches. Furthermore, it might be difficult to gauge the success of CSR-focused tactics. More socially responsible outcomes may result from such transparent approaches, but measuring and comparing them across firms can be difficult.

CSR and open organizing offer appealing ways for modern enterprises to address societal and environmental problems. Stakeholder involvement, an open approach, and the operationalization of CSR activities all present issues that must be taken into account. To achieve meaningful and socially responsible results, businesses should bear in mind the need to remain inclusive, be transparent, and work in true cooperation with stakeholders. The challenges that may arise while attempting to harmonize CSR with the various stakeholders' viewpoints and expectations must also be recognized. The challenges in generating meaningful and effective CSR outcomes include a lack of standards and the potential of shallow participation. However,

by acknowledging these constraints, organizations can work toward more effective and ethical practices that align with the needs of society and the environment. One strength of open strategy lies in its ability to create spaces and platforms for stakeholder engagement. This enables diverse perspectives to shape strategic decisions, thereby promoting meaningful interactions and fostering trust as shown in article 2 of this thesis. In addition, inclusive environments facilitate open discussions and ensure that participants feel respected and valued, thereby enabling more comprehensive and effective problem-solving processes (Edmondson, 2018).

As defined by Kujala et al. (2022), stakeholder engagement emphasizes the moral, strategic, and pragmatic aspects of relating to stakeholders. It is a process of building and maintaining relationships with various groups, involving two-way communication and transparency. This highlights the need for creating spaces and platforms for better understanding the perspectives and concerns of stakeholders. However, it is essential to recognize that stakeholder engagement itself can be a complex and challenging task, particularly in large and diverse organizations. It requires the appropriate tools, resources, and strategies to be effectively managed.

One limitation of open strategy initiatives is that the focus often lies in “including” a large number of people without sufficient attention to how these individuals interact with each other. The ongoing nature of openness, highlighted in stakeholder engagement literature, reveals the importance of continuity and managing interactions over time. This aspect of temporality should not be overlooked in open strategy processes, and organizations need to create and manage “zones of inclusion” to ensure trustworthiness and authentic engagement (Crane, 2020).

Moreover, the temporality of inclusion becomes crucial, as diverse stakeholders with different backgrounds may find it challenging to jointly develop and enhance the open strategy

process (Splitter et al., 2023). The organization's responsibility lies in nurturing a sense of belonging and authenticity through repeated engagement sessions. According to research on temporal dynamics in strategy work, these episodes within a longer process contribute significantly to open strategy-making (Burgelman et al., 2018; Jarzabkowski & Seidl, 2008).

Despite the potential benefits of open strategy and stakeholder engagement, it is essential to recognize the challenges and limitations associated with these approaches. One significant challenge is managing the diverse perspectives and interests of stakeholders, which can lead to conflicts and disagreements during the decision-making process (Dobusch & Kapeller, 2018). Balancing competing demands and ensuring equitable participation is no easy task, particularly when dealing with complex problems such as SDGs. SDGs are too complex to be solved by a single organization alone. This is an important limitation to consider when discussing the potential benefits of an open strategy. While open strategy can facilitate stakeholder engagement and lead to more inclusive decision-making processes, it may not entirely address the sheer scale and complexity of SDGs. These challenges often require collaborative efforts that involve multiple organizations, governments, and even global institutions. Furthermore, open strategy processes may face practical constraints, such as time, resources, and communication issues. Therefore, sustaining long-term engagement with stakeholders can be challenging and organizations may struggle to maintain the momentum and enthusiasm of participants over time, as evidenced in article 2 of this thesis, where the movie was developed in order to deploy the new strategic plan and not lose the momentum, later HomeCo developed the implementation platform, presented in article 3, again in order to engage with stakeholders over time.

The concepts of open strategy and stakeholder engagement offer valuable insights into addressing the complexities of SDGs and involving diverse perspectives in decision-making

processes. However, while these approaches present promising solutions, they also come with limitations and challenges that organizations must consider. Striking a balance between inclusivity, transparency, and the ongoing nature of openness is crucial to ensure the effectiveness of these strategies in navigating the intricacies of modern business environments, and the case study presented in this thesis illustrates this well, navigating through moments of openness and closure during the process and building and developing a culture of openness and trust through time over the last thirty years. The success of open strategy lies not only in its initial implementation but also in its ability to sustain inclusive practices over time to achieve meaningful and lasting impact.

7.4. Contributions of the Thesis to the Material Aspect of Open Strategy

7.4.1. Managing the Complexity of Inclusion and Commitment in Open Strategy

Open strategy offers promising avenues for organizations to navigate the complexities of today's business landscape. By integrating insights from various stakeholders and fostering organizational commitment, open strategy can create a collective understanding and direction as Articles 2 and 3 of this thesis have brought forward. However, a nuanced examination reveals both opportunities and challenges in effectively bridging complexity, inclusion, and organizational commitment within this approach.

Embracing complexity is fundamental in open strategy, as it acknowledges the multitude of factors, perspectives, and uncertainties that organizations encounter, which has been evidenced in Article 1. The recognition of organizational, strategic, and technical complexities facilitates a deeper understanding of how these dimensions interplay and impact the decision-

making process. Organizations must be mindful of the potential tensions that could arise from managing various complexities simultaneously. Thus, a thoughtful consideration of trade-offs and prioritization becomes essential to avoid diluting the strategy or overwhelming stakeholders (Luedicke et al., 2017).

Inclusion lies at the heart of open strategy, advocating for a diverse set of participants and perspectives (Tavakoli et al., 2017; Whittington et al., 2011). Engaging multiple stakeholders with different agendas, resources, and values enhances the richness of information and fosters creativity (Seidl et al., 2019b). However, the process of managing inclusivity is not without challenges for organizations. Balancing the desire for diverse input with the need for streamlined decision-making can be demanding for organizations. Moreover, ensuring equitable representation and meaningful engagement of stakeholders requires careful design and facilitation by the organization such as the findings of article 1 of this thesis suggests.

Commitment is a linchpin in open strategy and drives successful implementation and organizational alignment (Gast & Zanini, 2012; Tawse & Tabesh, 2021). When participants are empowered and feel a sense of ownership over organizational strategy, organizational commitment can flourish, as is evidenced in Article 3 of this thesis. In addition, the use of artefacts and narratives as guiding tools can instill a shared sense of purpose, thereby creating a collective commitment to the organization's objectives. However, developing this commitment is an iterative process that requires ongoing effort. Organizations must be prepared to navigate resistance and adapt their approaches to sustain engagement over time.

The interplay among materiality, openness, and organizational commitment is a crucial aspect in understanding how artefacts can effectively support the implementation of strategies.

This argument draws attention to the tangible and intangible elements that influence employees' behavior, attitudes, and alignment with the organization's objectives.

7.4.2. The Communicative Role of Artefacts in Fostering Inclusion and Commitment

Materiality refers to the physical and visible aspects of artefacts—including physical objects, technological tools, and infrastructures—that hold significant meaning and influence within an organization (Heracleous & Jacobs, 2008; Jarzabkowski et al., 2013). Material artefacts play a dual role in the context of sustainability-driven strategies. First, they act as vehicles for communication and representation (Jarzabkowski & Spee, 2009; Kaplan, 2011; Werle & Seidl, 2015), thereby conveying the organization's commitment to sustainability among both internal and external stakeholders. Second, material artefacts can directly influence employees' behavior by shaping their work practices and interactions (Orlikowski, 2007). As shown in this thesis, material artefacts not only demonstrate the organization's commitment to sustainability but also serve as tangible references for employees during the process. They can influence decision-making, thereby encouraging employees to prioritize sustainability aspects throughout their daily activities.

Openness in strategy-making processes emphasizes inclusivity, transparency, and collaboration with diverse stakeholders. In the context of sustainability, openness can imply involving employees from various departments, customers, suppliers, and community members in the co-creation of sustainable strategies. By engaging employees in a participatory manner, the organization can tap into their diverse expertise and perspectives, thereby leading to more robust and contextually relevant sustainability-driven strategies, which is again evidenced in articles 2

and 3 that show the high level of commitment and participation of stakeholders throughout the process. Openness also fosters a culture of shared ownership, thereby enabling employees to feel a sense of responsibility and commitment to the strategies they help shape. This involvement in strategy development through open dialogues and collaborative processes nurtures a shared vision and aligns individual and organizational objectives with sustainability principles.

Organizational commitment is a critical driver of strategy implementation success. When employees are fully engaged and committed to the organization's goals, they are more likely to align their actions with sustainability-driven strategies. Artifacts play a vital role in cultivating organizational commitment by creating a sense of purpose, pride, and identity within the organization as article 3 in this thesis has shown.

Moreover, artefacts can function as mnemonic devices, reminding employees of the organization's mission and values as well as encouraging them to act in ways that align with sustainability goals. This symbolic reinforcement helps sustain organizational commitment to sustainability-driven strategies over time, even in the face of challenges and uncertainties, this was also evidenced in the case study presented in this thesis, where some stakeholders would say to their colleagues in a conversation "that is not useful", referring to the documentary used during the implementation phase, which was entitled "USEFUL."

The interplay between materiality, openness, and organizational commitment is instrumental in leveraging artefacts to support the successful implementation of sustainability-driven strategies. By recognizing the tangible and intangible aspects of artefacts, organizations can effectively communicate their commitment to sustainability, engage employees in participatory strategy-making processes, and cultivate a sense of ownership and dedication to sustainable objectives. Integrating material artefacts strategically within an open and inclusive

approach empowers employees to act as change agents, thereby facilitating the adoption and alignment with sustainability-driven strategies throughout the organization.

However, while these tools are valuable, the potential downside is the risk of over-reliance on standardized frameworks, which might overlook individual and contextual variations. In dynamic environments, where change is constant, rigid frameworks may discourage the adaptability required to remain competitive and responsive. Organizational change and organizational commitment are multifaceted processes influenced by various factors beyond material tools. Developing comprehensive tools and frameworks can be beneficial to develop a collective narrative and create a common understanding of the organization's direction; however, it may also oversimplify the complexities inherent in strategy-making. stakeholder engagement involves diverse perspectives, interests, and agendas. Expecting artefacts alone to guide employees' actions and decisions may disregard the need for continuous dialogue, adaptation, and dynamic responses to emerging challenges, and may not guarantee complete alignment of employee actions with organizational objectives.

7.5. Contributions of the Thesis to Rethinking Open Strategy: Moving Beyond Inclusion Toward Alignment and Continuity

7.5.1. Moving Toward Embedded Openness and Authentic Engagement

The concept of open strategy has gained traction in recent years, advocating for the inclusion of various stakeholders in strategic decision-making processes (Seidl et al., 2019a; Stadler et al., 2023). It is often assumed that involving a diverse range of perspectives will lead to better strategic decisions and improved organizational outcomes. However, a critical

examination of the objectives and implementation of open strategy reveals the need to question its true value and refine even more the concept of open strategy and push its boundaries even further.

One parallel that warrants scrutiny is the comparison between open strategy and embedded CSR within organizations. Embedded CSR refers to the integration of social and environmental concerns into an organization's strategies, policies, and operations, permeating the entire organizational culture (Aguinis & Glavas, 2013; Risi & Wickert, 2017). Similarly, open strategy seeks to be inclusive and participatory in its approach, aiming to engage multiple stakeholders in the strategic decision-making process (Tavakoli et al., 2017; Whittington et al., 2011). However, a key question that emerges is: Is the objective of open strategy to merely include various voices and perspectives, or is it about fostering awareness, consciousness, and alignment with the strategic direction of the organization?

Arguably, the latter perspective holds more value. While inclusion and participation are essential aspects of open strategy (Mack & Szulanski, 2017), they should not be the sole objectives. A strategy that involves numerous stakeholders without achieving a deeper understanding and alignment with the organization's purpose and vision risks becoming diluted and fragmented. It is crucial to move beyond simply having people at the table and shift toward nurturing a shared sense of direction and commitment to the strategic goals.

7.5.2. Temporality and the Dynamics of Collective Engagement

The emphasis on temporality and the need to nurture a sense of belonging and authenticity (Jansen et al., 2014) among participants over time aligns with the notion that CSR

requires ongoing commitment and integration within an organization, as this thesis has shown in article 2. The concept of strategizing as a dynamic and collective engagement involving multiple stakeholders is also a relevant aspect, as it emphasizes the distributed nature of strategic decision-making in organizations.

In this vein, this thesis contributes to a long-standing conversation within the strategy literature between the views of Igor Ansoff and Henry Mintzberg. Ansoff contends that strategic planning is necessary for determining a plan of action, synchronizing the objectives of the organization, and adjusting to changing situations. On the other hand, Mintzberg is a supporter of the emerging school of thinking, which maintains that formal planning encourages established rigidities and limits the autonomy of various levels of management. Despite this, the development of a strategy is neither completely deliberate nor completely emergent. It falls somewhere in between.

This thesis contributes to this conversation by demonstrating how organizations can utilize open strategy to effectively ideate, formulate, and implement strategy. Open strategy should not be confined to a one-time event or project. Instead, it should be considered an ongoing, continuous, and embedded process. Emphasizing isolated moments of openness and participation may lead to sporadic engagement, thereby making it challenging to sustain momentum and meaningful contributions from stakeholders. A linear approach to open strategy, with distinct start and end points, can create an “initiative fatigue” where stakeholders may lose interest or feel disconnected from the strategy over time. The challenges of unsuccessful implementation often arise due to a lack of ownership and shared understanding of the strategy (Gast & Zanini, 2012; Merkus et al., 2019). This observation underscores the need for

transformative processes that genuinely engage individuals and transform their reality within the organization.

These findings of this thesis suggest that organizations could adopt a continuous and overlapping process of strategizing to address these limitations. This approach involves integrating specific practices and mechanisms that promote ongoing engagement and dialogue with stakeholders at various levels of hierarchy as HomeCo did in the case study presented in this thesis. Rather than relying solely on occasional workshops or feedback sessions, continuous strategizing incorporates feedback loops, regular check-ins, and mechanisms for capturing insights and ideas from stakeholders throughout the strategic planning and implementation phases (through the regular vision seminars HomeCo has been organizing for the last thirty years, or a more recent example, through the implementation platform on which anyone could suggest new actions to implement the strategy as was shown in articles 2 and 3 of this thesis). Although this does require organizations to develop specific practices, processes, and routines and to engage in a two-way dialogue with its stakeholders, when implemented in an effective and efficient manner, open strategy can contribute to creating strategies, sharing knowledge, building consensus, establishing commitment, and cultivating flexibility within an organization.

The temporality of these inclusion spaces and platforms is crucial within the overall process. By repeating these spaces at different stages, organizations can continually nurture the sense of belonging and authenticity among participants, as article 2 in this thesis shows through the development of a strong organizational culture fostering trust, and reinforce their commitment to the organization's strategy, as suggested by the findings of article 3, through the materiality of the strategic process, both of which require a continuous approach to be developed and sustained. This approach supports the definition of CSR in which Watts and Holme (1999)

highlight the concept of “continuing commitment,” thereby emphasizing the fact that CSR needs to be embedded in an organization over the course of a long period of time for it to be considered effective.

7.5.3. Reinventing Organizational Structures to Facilitate Open Strategizing

In line with the need for organizations to reinvent their organizational structures and processes to openly strategize and move toward a continuous and overlapping process, the emerging importance of the role of facilitation and facilitators brought forward in article 1 is emphasized. This thesis contributes to the open strategy literature by bringing forward facilitation and the role of facilitators as fundamental within open strategy processes and how the role of the facilitator is to guarantee structure, neutrality, and purpose within the overall process between organizations and participants. This is closely related to the design challenge that was mentioned by Splitter et al. (2023), who indicated that openness as an organizing principle will require novel ways of coordinating work and managing information flows, which lead to design challenges for decision-makers in organizations (Splitter et al., 2023, p. 15). Controlling openness comes as a significant challenge, but it is nonetheless essential for organizations. Thus, it is evident that it is wiser for organizations to engage with openness upfront in a controlled manner rather than leaving openness “unmanaged” (Diriker et al., 2023; Holstein & Rantakari, 2023; Reischauer & Ringel, 2022; Whittington & Yakis-Douglas, 2020). This emphasis on facilitators as key actors is certainly valuable, as it can enhance the effectiveness and inclusivity of open strategy initiatives.

7.6. Limits of this Thesis and Future Research Agenda

Open strategy offers the potential for enhanced reactivity and adaptability, it is essential to recognize that a successful transition to this approach demands significant effort and entails a learning curve. While this thesis has laid groundwork for future research by delving deeper into the mechanisms that enable effective stakeholder engagement, exploring the ongoing nature of openness in open strategy processes, and examining the role of materiality in supporting sustainability-driven strategy implementation (Friesl et al., 2021; Kujala et al., 2022), it also has its limitations, which opens up future research avenues.

Organizations must cultivate a culture that embraces transparency, encourages collaboration, and values openness such as HomeCo has been doing for the last thirty years. Additionally, a careful balance must be struck between open engagement and decision-making efficiency to avoid potential inefficiencies and delays. The unique setting of this case study offers a valuable insight into the possibilities and efficiencies of open strategizing, yet at the same time it is one of the greatest limits of this thesis as the effectiveness of the process is highly context bound. It would be interesting to replicate HomeCo's process in an organization that is unfamiliar to the concept of open strategy and which does not have such a profoundly anchored culture of openness.

Moreover, another limitation of this thesis is that it focuses on the importance of inclusivity and the involvement of various stakeholders in open strategy processes but does not delve into the complexities of managing diverse perspectives and ensuring effective collaboration among them. It would be beneficial to explore how organizations can handle potential conflicts and power dynamics that may arise when involving multiple stakeholders in

strategic decision-making. Although the role of facilitators in managing this has been emphasized theoretically in this thesis, an empirical study to uncover the practical tools and techniques to accomplish this would complement this research avenue. This is particularly linked to the fact that the interviews conducted with various stakeholders were not focused on this aspect and most respondents were very positive about the entire process. This raises the question of whether their insights can be generalized to the rest of the organization or whether there was a bias because only the stakeholders who were satisfied and positive about the process replied to my request to conduct an interview with them.

One critical aspect of open strategy and stakeholder engagement is the recognition of different complexities—organizational, strategic, and technical. While the thesis acknowledges these complexities, it might not fully explore how they interact and potentially create tensions within an organization. For example, engaging numerous stakeholders with varying perspectives and interests may lead to conflicting objectives, thereby impeding the development of a cohesive strategy. The interplay between organizational complexity, strategic complexity, and technical complexity demands a nuanced analysis to find appropriate solutions. It is essential to acknowledge that these types of complexity are not always distinct and can often overlap, thereby leading to compounded challenges. For example, organizational complexity may give rise to strategic dilemmas, and technical complexities can influence stakeholder interactions. It would be interesting in future research to focus on these three types of complexities and their dynamic relationships throughout the various phases of the process. The research conducted for this thesis was limited by the timeframe in which data collection started, as I started collecting data at the beginning of the implementation phase, thus relying on retrospective data for the ideation and formulation phases. Being able to assist in these particular phases in future research

and conduct observations and real time interviews could help in developing a more nuanced and critical reading of open strategy initiatives.

Finally, the thesis set out to investigate how open strategy could support the formulation and implementation of a socially responsible corporate strategy, which is also an important contextual element that should be discussed in terms of limitations. The time during which this process was conceived (2019) and launched (2020), then formulated and implemented (2021-22) was also quite unique due to the COVID-19 pandemic. This enabled HomeCo to reach out to all of its 150.000 employees, because of remote technologies being democratized. It is thus very likely that the process would have been very different had there not been multiple lockdowns, which also raised individuals' consciences about CSR topics and naturally generated an interest and willingness to contribute to the organization setting itself in motion on these topics. Although the primary factor resulting from the research conducted in this thesis does point towards their long-standing organizational culture to have played a significant role in the commitment of stakeholders; it would be interesting to compare the results from this study to one of an organization that conducted an open strategy initiative on different topics than those of CSR.

7.7. Managerial Recommendations

The first thing to do in order to begin open organizing is to acknowledge that the processes that the organization employs are inefficient. If an organization thinks it has not got sufficient time or money to accomplish its goals, or if its employees are not satisfied with the path their work takes them, it might be time to rethink the way things are done internally. Open

organizing will assist organizations in implementing these changes by providing them with a framework on how to arrange themselves more effectively over time in accordance with their requirements, as opposed to merely reacting if something occurs that is beyond their control.

This section develops two major contributions on how organizations can start open organizing: (1) through staff training and the attribution of specific roles such as facilitation, (2) through developing various tools and artefacts.

7.7.1. Contributions Concerning Staff Training and the Attribution of Specific Roles

Facilitation is a primary tool used by managers and other organizational leaders to effectively manage collaboration and collective intelligence. A facilitator must know how to effectively engage stakeholders and manage the different perspectives resulting from the discussions. They must also be able to provide guidance to the groups as they make decisions and address concerns. Thus, the skills of a facilitator are critical for managing the complexities of a stakeholder engagement processes. Specific tools that can be useful in managing these processes more effectively. There are a number of approaches that can be used to manage complexity in stakeholder engagement and open strategy processes. One approach is to employ a structured process for identifying and engaging stakeholders. This can involve mapping out all of the stakeholders involved in the issue or decision at hand, and then assessing their interests, goals, and objectives, as evidenced in Article 2, where a stakeholder consultation was organized in order to assess the perception stakeholders have of the organization and where it should improve. This information can be used to develop a communication and engagement plan that considers the different needs of each stakeholder group.

7.7.2. Contributions Concerning the Development of Tools, Artifacts, and Spaces to Foster Inclusion

The next thing that has to be done is to provide a place or platform where individuals can get together and talk about what they want to get out of their work. It can appear to be a straightforward idea, but many businesses either do not grasp its importance or do not put its principles into practice correctly. It is one thing to tell people that they are equal and that their voices should be heard; it is an entirely different thing to genuinely make them feel as though their thoughts are important. During meetings in which employees are asked what they think about a specific topic, it is frequently observed that rather than speaking up and expressing their opinions, they choose to remain silent and await the turn of another person to do so. This is due to the fact that many employees do not feel that their perspectives are valued in their workplaces. They are not provided with an opportunity to speak up or be heard; rather, it is expected of them that they would simply do what they are told without posing any questions. For example in the case study presented, HomeCo has developed a leadership model based on four elements (authenticity, interdependence, openness and impactfulness) that drives the employees' actions on a daily basis and contributes to creating a psychologically safe work environment.

Have others shared their opinions to cultivate an atmosphere in which they feel their contributions are valued. Ask them things like, “What do you think of the new design of our website?” and “How can we make this procedure more efficient?” to obtain their feedback. It makes no difference at all whether the responses are not what you anticipated; what is important is that people have the sense that their thoughts are being heard and acknowledged.

Providing people with the opportunity to have an impact on the world is yet another strategy for fostering an atmosphere in which they feel valued and appreciated. When people believe that the tasks they are performing are important, they are more likely to be willing to put in the additional effort that is necessary to make things happen. Instead of remaining silent and looking for someone else to begin the conversation, organizations can accomplish this goal by inquiring about the individuals' perspectives on the subject matter at hand.

Another approach is to create clear and concise communications regarding the issue or decision being made. This includes providing background information (as was done during the workshop in the implementation phase that is detailed in article 3 of this thesis), explaining the options under consideration, and outlining the risks and benefits associated with each option. It is also important to ensure that all stakeholders have an opportunity to provide their input in the decision-making process. Establishing clear communication channels among all parties involved is yet again a straightforward recommendation but often not applied. This includes both formal and informal communication, and it is important that everyone is aware of what information needs to be shared and how it should be shared. This can help to reduce confusion and ensure that everyone is on the same page.

Finally, this thesis provides valuable insights into the challenges of managing open strategy, its inherent openness, and the complexities of the contemporary business landscape in strategy-making processes. However, it is essential to acknowledge the limitations and complexities inherent in these approaches. By critically examining the interplay of organizational, strategic, and technical complexities and addressing potential pitfalls, organizations can develop more effective and adaptive sustainable strategies. Embracing open strategy requires careful navigation, as it involves cultural shifts, potential standardization risks,

and the management of uncertainties and conflicting imperatives. Ultimately, developing a sustainable future demands a multidimensional approach that integrates diverse perspectives, skills, and knowledge sources to effectively tackle the complexities of today's VUCA world.

Managing complexity in stakeholder engagement and open strategy processes is critical for any organization. It takes a considerable amount of skill to ensure that stakeholders are engaged, objectives are met, and the process runs smoothly. By understanding the complexities involved, organizations can better equip themselves to engage their stakeholders in an effective manner and develop strategies more efficiently. The key is to remain mindful of the complexities at hand and be prepared to tackle them head-on as they arise.

7.8. Conclusion

In the last decade, “openness” has become an increasingly important organizing principle for a wide variety of institutions and groups. The concept of “openness” refers to the use of collaborative methods and technologies to promote transparency, inclusiveness, and participatory decision-making within organizations (Splitter et al., 2023). Openness is often seen as a means to improve organizational efficiency and effectiveness, increase public engagement with and support for an organization’s work, and address grand societal challenges such as sustainability. However, openness also introduces complexities, including the need to manage stakeholder engagement, navigate diverse perspectives, and ensure effective strategy implementation (Kujala et al., 2022; Seidl et al., 2019a). Building on these observations, this thesis aimed at investigating how open strategy practices can support the formulation and implementation of an organization’s socially responsible corporate strategy; and the research conducted reveals that open strategy transforms the manner in which strategy is formulated and implemented rather than supporting the traditional way of doing things.

The problem statement in this thesis highlights the challenges organizations face in managing stakeholder engagement and openness in their strategy-making processes and the complexity of the GSCs that face humanity. Complexity arises at the organizational, strategic, and technical levels, thereby making it difficult to coordinate activities, develop a clear strategy, and ensure effective implementation (Gast & Zanini, 2012; Seidl et al., 2019a). Stakeholder engagement is a critical aspect of openness, and organizations must address the challenges of control, participation, inclusion, and transparency to foster meaningful engagement. The intersection of these elements lies in exploring how organizations transition toward

organizational openness in addressing CSR subjects and this thesis focuses on exploring how this is set in motion through open strategy practices and processes.

The intersection of sustainability, stakeholder engagement, and open strategy practices presents both opportunities and challenges for organizations. By embracing openness and effectively managing stakeholder engagement, organizations can harness diverse perspectives, enhance organizational commitment, and drive sustainable strategies. This requires addressing complexities, fostering inclusion, and leveraging the materiality of artefacts. The integration of sustainability-driven strategies within open strategy practices can pave the way for organizations to navigate the complexities of the modern business landscape and contribute to addressing GSCs. Bringing together the various articles developed in this thesis emphasizes the importance of process skills in organizations that engage in more openness, whether it be through open strategy or in other domains such as open innovation, open government, or open science.

Overall, the case study developed in this thesis demonstrates the benefits of open organizing in formulating CSR-oriented strategies. By involving a diverse range of stakeholders—including employees, customers, associations, and local communities—organizations can gain valuable insights into societal needs and expectations. This broad input enables the identification of relevant CSR issues and ensures that the strategic goals align with stakeholders' interests. Moreover, the open organizing approach fosters stakeholder engagement, thereby promoting a sense of ownership and commitment to the CSR strategy. This engagement is critical as CSR initiatives often require collective efforts and support from all involved parties.

The arguments brought forward in this dissertation provide insights into how open strategy can enhance the implementation of CSR-oriented strategies by focusing on trust and inclusivity as central elements of open strategy. This study reveals that trust serves as an enabler

of inclusion among stakeholders. By establishing trust through transparent and inclusive practices, organizations create a psychologically safe environment in which individuals feel valued and empowered to contribute their unique perspectives. This sense of belonging and authenticity further motivates stakeholders to actively engage in CSR implementation, thereby fostering a culture of commitment and collaboration. Additionally, the highlighted temporality of inclusion suggests that carefully balancing the involvement of stakeholders at different stages of implementation can streamline the process, thereby reducing complexity and enhancing organizational commitment.

Finally, this thesis emphasizes the materiality of strategy functions as part of CSR implementation. It brings evidence that the use of artefacts and tools plays a significant role in guiding and supporting employees throughout the implementation phase. These material objects not only facilitate knowledge dissemination and appropriation but also contribute to building personal commitment to the CSR strategy. Employees' dedication to aligning their actions with organizational objectives is crucial for the successful implementation of CSR-oriented strategies. The interdependence of three components—knowledge, ability, and willingness—highlights the need to continuously enhance employees' commitment through collective actions.

Collectively, the results from the three articles demonstrate how open organizing and open strategy can effectively support the formulation and implementation of CSR-oriented strategies. The first paper opens a theoretical discussion regarding the complexity of open strategy and the role of facilitation within open strategy processes. A qualitative meta-synthesis of 25 peer-reviewed journal articles in the field has been conducted and the study consolidates the existing literature on open strategy and extends the theoretical constructs by identifying five key constructs for managing openness in strategy-making processes: encouraging procedural

openness, organizing group dynamics, developing process guidance, facilitating accessibility, and building legitimacy and buy-in.

Furthermore, the article proposes a model that emphasizes the significance of structure, neutrality, and purpose in dealing with the challenges organizations face in adopting openness. By considering these elements, the model extends theorization on open strategy and bridges the findings with stakeholder engagement literature (Kujala et al., 2022). The role of facilitators and facilitation skills are highlighted as crucial in managing complexities and enhancing the experience of inclusion and participation in open strategy initiatives. It is argued that organizations need to develop facilitation expertise to effectively navigate the open strategy process.

The open organizing approach, as explored in Article 1, enables organizations to identify and prioritize CSR issues relevant to stakeholders' interests. By involving diverse stakeholders and fostering engagement, organizations can develop strategies that align with societal needs and expectations under the guidance of a facilitator orchestrating the interactions between the organization and its various stakeholders.

The second paper empirically investigates open strategy through the case study of a multinational in the DIY and home improvement industry. While the benefits and challenges of openness in strategy have been acknowledged, there is a need to explore the levers that foster participant inclusion within open strategy processes (Dobusch et al., 2017; Seidl et al., 2019b; Vaara et al., 2019).

To foster participant inclusion in open strategy, it is important to consider strengthening the sense of belonging and authenticity, reducing dilemmas, and building trust (Crane, 2020;

Hautz et al., 2017; Jansen et al., 2014; Seidl et al., 2019b). The study emphasizes the importance of trust, significance, and temporality in creating inclusive environments where individuals feel respected, valued, and empowered to contribute their unique perspectives. Trust fosters openness and enables individuals to participate fully, while significance recognizes and celebrates individuals' identities and contributions. Temporality acknowledges historical inequities, addresses present biases, and plans for a more inclusive future. By considering these intertwined elements, organizations can create environments that prioritize diversity, equity, and ongoing progress.

Article 2 further reinforces the role of open strategy in the CSR context. It shows that, by building trust, inclusivity, and psychological safety, organizations create an environment that is conducive to commitment and collaboration. Stakeholders are more willing to actively contribute to CSR implementation when they feel valued and included in the decision-making process. The temporality of inclusion also provides insights into managing complexity during implementation, thereby ensuring that commitment remains high throughout the process.

The last paper empirically builds upon the same case study, adopting a more in-depth approach on strategy implementation. It brings evidence that communication, along with materiality and openness, are key factors that foster organizational commitment and shape the activities of strategizing (Heracleous & Jacobs, 2008; Jarzabkowski et al., 2013; Kaplan, 2011; Whittington et al., 2006). The study explores the artefacts utilized and their impact on conveying the strategic plan and fostering commitment among the organization's 150,000 employees. The findings of this study illustrate their role in enhancing knowledge, appropriation, and empowerment among employees. The analysis reveals the interdependence of three components—knowing, being able, and wanting—in developing and maintaining commitment to

strategic implementation. By integrating the definition of organizational commitment to strategic implementation, the study provides a complementary perspective to existing research (Weiser et al., 2020). Overall, this research contributes to the understanding of strategy implementation by investigating the materiality of artefacts and their impact on employee commitment. Moreover, it emphasizes the need for a more comprehensive knowledge of the factors that influence strategy implementation and highlights the interplay among materiality, openness, and organizational commitment.

Finally, Article 3 highlights the significance of material objects and tools in guiding employees during the implementation phase. Through the continuous enhancement of employees' commitment and alignment with CSR objectives, organizations can effectively navigate the challenges of implementation.

This thesis explores open strategy's role in promoting inclusion in organizations. It highlights the need to move beyond just participation to create an environment that values diverse perspectives. While transparency is essential, it alone may not ensure marginalized voices are heard, and dismantling power imbalances is crucial. Corporate culture can foster openness but may hinder innovation, and stakeholder engagement must balance conflicting interests. Success in open strategy requires careful consideration of power dynamics, cultural norms, and facilitators to guide the process.

It examines the integration of CSR with open strategy, thereby emphasizing transparency and stakeholder involvement. While open strategy can enhance CSR alignment by involving more people in decision-making, it poses challenges in balancing economic, environmental, and social objectives, as well as managing stakeholder interactions and potential "greenwashing." Collaborative approaches can address these challenges but may encounter issues related to

transparency, diverse voice inclusion, and employee perspectives. Furthermore, the lack of uniform CSR standards and difficulties in measuring success complicate the implementation. Overall, CSR and open strategy offer potential solutions for societal and environmental issues but require a delicate balance between inclusivity, transparency, and long-term commitment to achieve lasting impact.

Moreover, the thesis explores the role of open strategy in managing complexity, inclusion, and organizational commitment within organizations. Open strategy, which promotes transparency and stakeholder involvement, can create collective understanding and direction. Embracing complexity is crucial, as it recognizes the multitude of factors impacting decision-making. Inclusion advocates for diverse participants and perspectives, but balancing inclusivity with streamlined decision-making can be challenging. Organizational commitment is vital, and material artifacts play a key role in fostering commitment by communicating the organization's dedication to sustainability and influencing employee behavior. However, over-reliance on standardized frameworks may overlook individual and contextual variations, and expecting artifacts alone to guide employee actions may disregard the need for continuous dialogue and adaptation. Balancing materiality, openness, and commitment is essential for effective sustainability-driven strategies.

Finally, it advances the concept of open strategy, suggesting a shift from mere inclusion to fostering alignment with organizational goals. It draws parallels between open strategy and embedded CSR, thereby highlighting the need for open strategy to go beyond involving stakeholders and focus on creating a shared sense of direction and commitment. The thesis emphasizes the importance of temporality, suggesting that open strategy should be an ongoing, continuous process to maintain engagement and commitment. Additionally, it underscores the

role of facilitation in managing open strategy effectively by ensuring structure and neutrality. Overall, the thesis advocates for a more nuanced and continuous approach to open strategy that aligns stakeholders with organizational objectives.

While open strategy holds promise for enhanced adaptability, it requires significant effort and a culture of transparency and collaboration within organizations. One limitation is the contextual specificity of the case study, which may not be applicable to organizations unfamiliar with open strategy. Additionally, the thesis focuses on inclusivity and stakeholder involvement but does not delve deeply into managing conflicts and power dynamics that can arise. Future research could explore practical tools and techniques to address these challenges. The thesis acknowledges different complexities (organizational, strategic, technical) but does not fully explore their dynamic interactions and potential tensions within organizations. Future studies could delve into the interplay between these complexities throughout open strategy processes. Finally, the unique timing of the process during the COVID-19 pandemic may have influenced stakeholder engagement, and future research could compare open strategy initiatives in different contexts to gain a more comprehensive understanding.

In conclusion, this thesis shows that open organizing through open strategy is a powerful approach for formulating and implementing CSR-oriented strategies. By engaging diverse stakeholders, fostering trust, and providing the necessary tools and frameworks, organizations can enhance commitment, collaboration, and, ultimately, the success of their CSR initiatives. Therefore, embracing open organizing and open strategy can pave the way for more socially responsible and sustainable business practices, thereby addressing the expectations of stakeholders and society at large.

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Appendix 1. Case Studies Reviewed for the Qualitative Meta Synthesis of Article 1

Author(s)	Brief description of the case study(ies)	Nature of people/Level of analysis	Main observation(s)
Amrollahi and Rowlands (2017)	A case study in an Australian university implementing a proposed method of open strategic planning.	Internal/organizational	Introduction of a pre-planning phase in open strategy processes. Context-specific case of flat organizations.
Amrollahi and Rowlands (2018)	A multicase approach in an open source software project and in a life-long learning institution, used to test the process of open strategizing	Internal and external/organizational	Use of a formal planning process and implementation of an IT platform. Diversity of participants has been shown to increase the effectiveness of the process.
Bjelland and Wood (2008)	An inside view of IBM's "Innovation Jam," bringing together 150,000 employees and stakeholders in an online collaborative platform	Internal and external/organizational	Division of the tasks among different stakeholders and their capabilities but implementing a feedback loop for those excluded from part of the process and reintegrating them for a refinement phase. A team was assigned for several weeks to read all the comments and ideas and categorize them.
Bryant et al. (2011)	A UK university's open strategy initiative to deal with low results from their employee satisfaction survey	Internal/organizational	Organizations committed to implement the proposed ideas before launching the initiative
Castelló et al. (2016)	A multinational pharmaceutical corporation developing its stakeholder engagement through social media	External/organizational	Opening up communication process to external audiences to gain awareness and set agenda
Deken et al. (2018)	An automotive company exploring a strategic issue with its stakeholder network, specifically with its suppliers.	External/interorganizational	"Prospective resourcing" sourcing potential business partners and co-developing a project and exploring possibilities
Denyer et al. (2011)	A large multinational telecommunications company that is commonly regarded as one of the leading proponents of Enterprise 2.0	Internal/organizational	Lack of explanation and purpose for the initiative allow for inappropriate conversations to flourish (discussion of non-strategic topics) Managers limiting the debate on the platform to what they find appropriate to discuss.

Author(s)	Brief description of the case study(ies)	Nature of people/Level of analysis	Main observation(s)
Dobusch et al. (2019)	Analysis of Wikimedia's open strategy process	Internal and external/organizational	Employees not being able to use the open platform because of lack of skills Lack of skills and accessibility of the practices for the potential stakeholders (IT & language)
Dobusch and Kapeller (2018)	Cross-analysis of the case studies on Wikimedia's and Creative Commons' open strategizing initiatives	External/organizational	Differentiation between crowds and communities regarding expectations toward openness.
Franken and Thomsett (2013)	A case study presenting how the UK's Royal Marines developed an adaptation of wargaming to affect strategic change in Afghanistan	Internal and external/interorganizational	Strategic plan developed by a closed group and communicated as final to participants. Small group of people participate in an open strategy initiative, which is then successfully deployed and implemented by over 6,000 people.
Gegenhuber and Dobusch (2017)	The case presents two new technology start-ups using blogging as a means of open strategizing with their communities.	External/organizational	Organizations shift from a highly inclusive and transparent model to a low inclusion and highly transparent model as they grow and become more established. Expectations of participants were overachieved and resulted in higher support from the community.
Harrison et al. (2010)	A case study presenting an interorganizational strategic initiative to establish a sourcing network	External/interorganizational	Participants are selected and categorized based on their skills and knowledge.
Jarzabkowski and Balogun (2009)	A case of a multinational attempting to develop greater strategic integration across Europe	Internal/interorganizational	Resistance met by the organization because it attempted to create a collective strategy without consulting key players in the design or strategizing and implementation phase.
Lennox et al. (2011)	Two case studies examining the collaborative strategy-making initiatives around the	External/organizational	The need for recognition of participants varies depending on the stakeholders and their skills and knowledge. Need to consider the needs of individual stakeholders. The process of open strategy relies on

Author(s)	Brief description of the case study(ies)	Nature of people/Level of analysis	Main observation(s)
	strategic issue of water governance in New Zealand		clear communication of expectations, objectives, and practices.
Luedicke et al. (2017)	The paper develops the case of extreme open strategizing in the Premium Cola collective in Germany.	Internal and external/organizational	<p>Many people subscribed to the mailing list, but few interacted and responded to participate in the debate.</p> <p>Participants have the possibility of setting the agenda or interacting on any subject if they want.</p> <p>The CEO has the legitimacy to impose decisions even in collective decision-making processes because the CEO is legally and financially responsible (participants do not reject this practice).</p> <p>Participants did not contribute substantially (small group of people contributing regularly) because of information overload and information asymmetry.</p>
Morton et al. (2020)	Formal strategic planning-cycle at InfoLib, an organization that represents Library and information-based professionals in 18 sectors across the United Kingdom (UK).	Internal and external/organizational	<p>Strategists use digital work in a variety of ways to guide strategy development and implementation.</p> <p>Sheds light on four modes of open strategizing: broadcasting, soliciting, collaborating, and actioning.</p>
Regnér (2003)	Four Swedish multinationals evolving in different industries (telecommunication and equipment, mechanical trailer coupling assembler and manufacturer) were selected for their strategy-creation issues.	External/interorganizational	<p>Diversity of opinions and approaches linked to the diversity of backgrounds.</p> <p>Lower management is closer to the market and its realities.</p>
Schmitt (2010)	The paper presents the extensive case study of the Shell-led Camisea gas project in Peru, which developed a sensemaking initiative with	External/interorganizational	An organization needs to be credible in its ability to deliver what is brought forward in the planning phase.

Author(s)	Brief description of the case study(ies)	Nature of people/Level of analysis	Main observation(s)
	various stakeholders to navigate socio-political and ecological issues.		Lack of expertise by the initial participants to answer the problem; thus, integration of new participants in order to gain expert insights Participants require various tools and practices adapted to their needs and pace to help them make sense and interact with each other and the organization.
Seidl and Werle (2018)	Two cases of interorganizational sensemaking are presented in this study. The first one expressing a problem of sustainability and the second one a problem of business operations	Internal and external/interorganizational	Intraorganizational sense-making begins by looking for organizations with common interests in a defined problem and looking for diverse backgrounds able to contribute with their specific opinion. Consensus is difficult to reach with a higher number of participants with individual interests and ideas. Iterative dynamic is installed through the process of setting aside and creating new groups of open strategizing on a particular topic of interest revealed in the first round of the process. This also leads to a dynamic of change in the composition of participants who have an interest in the subject.
Stieger et al. (2012)	The study presents a crowdsourcing initiative called DialogTage in an Austrian automotive company.	Internal/Organizational	The limited period of the open initiative was inconvenient and restricted participation of several people willing to do more The most impactful ideas were crowded out by the large quantity of information circulating with lower relevance either because of the skills required to debate the subject or because of the time-consuming task of reading all

Author(s)	Brief description of the case study(ies)	Nature of people/Level of analysis	Main observation(s)
Van der Steen (2017)	The papers present a collective sensemaking initiative in the Dutch bank Rabobank. The study compares two workshops held in two different banks of the brand.	Internal and External/Organizational	posts. People can integrate pre-formulated strategic objectives, the creation of which they did not participate in through practices of sense-giving.
Zaggl et al. (2019)	This case study analyzes the dynamics and relations in the ecosystem of open-source gaming handhelds. In particular, they focus on three organizations and their interactions with the community of users.	External/Organizational	Communities and crowds have different motivations to participate in open strategy (user-developers vs user-non-developers) Participants and organizations move through various levels of openness either given by the organization or taken by the participants.

Appendix 2. Evidence of the Coding Process—Article 1

First-order codes	Code present in X/21 cases: Code supported by X references	Representative data [Case reference in QMS (see Appendix 1)]
Dialogue and transparency	18/21 cases: 104 references	<ul style="list-style-type: none"> • “We have to recognize that sometimes we set the agenda, sometimes it will be them [the stakeholders] who will set the agenda.” [5] • “[...] respondents were asked to express the most important goal of the project based on their own point of view, and their position in the project. Then, they were asked to check if those objectives were reflected in the plan (or not).” [2] • “The founder of Project Ninja directly aimed at openness and involving the community in joint decision-making and the co-development of code. He continuously informed the community about the development activities, asked for ideas and advice, and discussed technical specifications.” [21] • “Rather, in providing the stakeholders with an open texture for interaction, Shell was able to build relations with their stakeholders, even when they were adverse, that lasted longer than the Camisea project.” [17]
Monitoring/regulation of the process practices and participants	20/21 cases: 145 references	<ul style="list-style-type: none"> • “In addition, a challenge was presented by the lack of strategic attributes in ideas, for example in the case that participants submitted ideas that could be considered short-term improvements in the work environment and thus lacking strategic value.” [1] • “As a ConsuCo manager explained, to be able to properly explore the selected issues “you actually want a variety of perspectives across sectors that is far bigger than the variety of perspectives within a sector.” [18] • “Repeated resource exploration with multiple potential partners may be needed for managers to become familiar with the potential value of such resources.” [6] • “The program was in three main parts. In the first two parts, participants worked in Action Groups, each addressing a different cross-cutting theme. Groups were formed on the day, with participants freely choosing the topic that they wished to discuss in each of the two sessions.” [4] • “The question is not whether to involve external actors but rather how to identify and involve actor groups, with the distinction between crowds and communities as a

First-order codes	Code present in X/21 cases: Code supported by X references	Representative data [Case reference in QMS (see Appendix 1)]
		categorization potentially guiding related governance choices” [8]
Participants considered as relevant	18/21 cases: 227 references	<ul style="list-style-type: none"> • “Senior executives and others spent weeks sifting through tens of thousands of postings.” [3] • “Overall, 12 organizations, with one to three representatives each, took an active part in those events. The participants came from various departments, including strategy, business development, R&D, and production.” [18] • “The General Director and the managers were clearly acting as sensegivers, with the consultant playing a supporting role.” [20]
Collaborative work dynamics	12/21 cases: 67 references	<ul style="list-style-type: none"> • “The first key factor identified was whether or not people thought it was safe to speak up within their business unit.” [7] • “In general, the Wikimedia Foundation set up the task forces on the assumption that minimum guidelines and maximum autonomy would result in the broadest possible participation of the community, as well as new volunteers.” [9]
Communication flows and information accessibility	15/21 cases: 61 references	<ul style="list-style-type: none"> • “From its inception, premium members decided to run their operations as a ‘collective’ (emic term) and to develop and continuously update a catalogue of ethical business rules that they call their ‘operating system’.” [14] • “This is our problem. What we do and say, as managers, comes across very differently to those who are not involved in the decision making process. People experience things differently to what we anticipate. We need coherent policies to allow us to communicate our intentions more clearly. That will result in a stronger employee involvement as they all work towards the same objectives.” [20]
Needs and capabilities of participants	18/21 cases: 143 references	<ul style="list-style-type: none"> • “In fact, without transparency in formulation and implementation of strategy ideas, stakeholders may feel that their ideas have not been incorporated at all.” [2] • “The dynamics we observed in the two cases can be seen as the result of an alignment or misalignment between the collaborators’ frame repertoires and interests in particular sets of cues.” [18]

First-order codes	Code present in X/21 cases: Code supported by X references	Representative data [Case reference in QMS (see Appendix 1)]
Flow of people in the process	18/21 cases – 94 references	<ul style="list-style-type: none"> • “While Laura, as with other members, acknowledges the ‘back and forth’ as important (‘your credo’), she ultimately asks to be removed from the list.” [14] • “Decisions about who to include in certain task forces were also made by a small group of Wikimedia board members, staffers and hired consultants, as is evident in a statement by one board member describing the difficulties in making these decisions” [9]
Process control & power balance	20/21 cases: 160 references	<ul style="list-style-type: none"> • “There will always be domination by a few opinion leaders. Our asynchronous communication approach slowed down the dialogue and gave participants time to structure their thoughts and to come up with the most important arguments.” [19] • “The steering committee (supplemented by other relevant employees from the four firms) developed clear objectives that were to be achieved during the strategy project.” [12]
Process and practice flexibility	20/21 cases: 489 references	<ul style="list-style-type: none"> • “We need to make sure that the process and the plan are owned by all of us This means that the process is flexible and forkable, and that the work happens transparently in an open and inviting space.” [9] • “Shaping arenas is an interactive process. If they are defined, one also has to be aware that arenas can develop different dynamics, which need to be considered.” [17]
Inclusion (quantity) vs. inclusion (engagement)	17/21 cases: 77 references	<ul style="list-style-type: none"> • “IBM brought 150,000 employees and stakeholders together to help move its latest technologies to market.” [3] • “This did not mean that all views on the issues at hand were uncritically accepted by everybody; however, the participants felt that the different perspectives enriched the group’s collective understanding of those issues, instead of competing with each other.” [18]
Reasons to engage in open strategy processes	10/21 cases: 24 references	<ul style="list-style-type: none"> • “Participants develop a shared picture of the present, develop a future vision and strategies for achieving these and make commitments to their implementation.” [4] • “The team members realized all too well that they lacked the resources internally to further develop their ideas.” [6]
Factors impacting openness levels	20/21 cases: 138 references	<ul style="list-style-type: none"> • “The introduction of the technology alone is not sufficient to result in open collaboration and communication; rather, a more dramatic change of organizational culture is needed to overcome the barriers associated with organizational politics.” [7]

First-order codes	Code present in X/21 cases: Code supported by X references	Representative data [Case reference in QMS (see Appendix 1)]
		<ul style="list-style-type: none">• “Since dialoguing ties up considerable organizational resources, it may also be more difficult to maintain this practice as the company grows.” [11]

Appendix 3. Evidence of the Coding Process—Article 2

Phased Approach to Strategy Development. The phased approach to strategy development in the context of the case study entails a structured progression of activities, beginning with pre-planning to set the groundwork, followed by the ideation phase to collect diverse ideas, and moving to the formulation phase for organizing insights into coherent directions. The subsequent planning phase designs actionable plans, and the implementation phase executes initiatives, monitors progress, and adapts strategies as required. This systematic approach ensures inclusivity, ownership, and alignment throughout the strategy development process, thereby resulting in a comprehensive and effective execution of the organization's strategic plan.

Table 11

First-Order Codes and Their Descriptions—Article 2 (Part 1)

First-order code	Description
Pre-planning phase	Initial stage of the strategic development process where key activities are undertaken to set the groundwork for the overall strategy formulation.
Ideation Establishment	Phase Initiating the strategic process with ideation activities to gather a diverse range of ideas and perspectives from participants.
Formulation Insights	Phase Building upon the ideation phase, the formulation phase involves distilling and organizing the collected insights into coherent strategic directions.
Planning Phase Design	Developing a concrete plan that outlines the goals, actions, and resources required to implement the formulated strategy.
Implementation Execution	Phase Putting the strategy into action by executing the planned initiatives, monitoring progress, and adjusting strategies as required.

Adaptive Strategy Development and Implementation. This theme refers to a strategic approach characterized by flexibility, alignment with the CEO's vision, a clear connection between immediate actions and long-term goals, and a creative navigation of challenges. This theme emphasizes the organization's ability to adapt its strategy in response to changing

circumstances, providing participants with a compelling vision set by the CEO that guides their actions. The strategy ensures that short-term initiatives are aligned with the organization's long-term objectives, reinforcing a shared sense of purpose and progress. When faced with challenges, the organization demonstrates creativity and innovation, thereby showcasing its adaptability and capacity to overcome obstacles in the pursuit of its strategic goals. In addition, this theme highlights the dynamic and responsive nature of the strategy development and implementation process, thereby enabling the organization to navigate uncertainties while maintaining a clear link between its immediate actions and its overarching vision.

Table 12

First-Order Codes and Their Descriptions—Article 2 (Part 2)

First-order code	Description
Conveying the CEO's Vision	Articulating the long-term vision and strategic direction set by the CEO to provide context and motivation for participants.
Linking Immediate Impact to Vision	Demonstrating how short-term actions contribute to the achievement of the organization's long-term goals.
Navigating Challenges Creatively	Overcoming obstacles through creative problem-solving and innovative approaches, showcasing the organization's adaptability.

Timely Engagement and Communication. In the context of the provided case study, this theme represents a comprehensive approach to strategy implementation that prioritizes open and transparent communication, ongoing dialogues, continuous engagement opportunities, and systematic feedback collection. Further, this theme emphasizes the organization's commitment to ensuring that all stakeholders are well-informed about the strategic plan's objectives, progress, and any modifications. Through open dialogues, the organization fosters a culture of active participation, thereby enabling participants to share their insights, concerns, and suggestions. A key element of this approach is the provision of consistent opportunities for engagement throughout the entire strategy process, encouraging ongoing involvement. The regular collection

and analysis of feedback from participants ensures that the strategy remains effective and relevant. By emphasizing timely engagement and communication, the organization demonstrates its dedication to inclusive decision-making and collaborative alignment, thereby fostering a shared understanding of the strategy's purpose and progress among all stakeholders.

Table 13

First-Order Codes and Their Descriptions—Article 2 (Part 3)

First-order code	Description
Transparent Communication Open Dialogues	Strategy Ensuring open and transparent communication regarding the strategic plan's objectives, progress, and changes. Facilitating ongoing discussions and conversations that allow participants to share their insights, concerns, and suggestions.
Engagement Throughout	Opportunities Providing continuous opportunities for participants to contribute throughout the strategy process.
Feedback Collection and Analysis	Collecting input and feedback from participants at regular intervals to evaluate strategy effectiveness.

Holistic Engagement. This represents a comprehensive and inclusive approach to strategy development that encompasses various dimensions of stakeholder involvement. This theme emphasizes the integration of multilingual communication to ensure that a diverse global audience can actively participate and contribute to the strategy formation process. Stakeholder inclusion and co-creation are fundamental and involve a broad spectrum of participants in collaborative efforts to shape the strategic direction and co-create innovative solutions. Participatory workshops serve as a cornerstone of this approach, providing a platform for participants to engage meaningfully, express their insights, align their commitment, and contribute to strategy refinement. The concept of master connectors and impulse circles adds another layer to holistic engagement, with enthusiastic advocates playing crucial roles in connecting diverse stakeholders, nurturing relationships, and driving engagement efforts. Additionally, global collaboration and transparency are pivotal, fostering open communication

and shared understanding across the organization's global units. This transparency cultivates trust, encourages collaboration, and ensures that insights, strategies, and commitments are openly shared, thereby enhancing the organization's ability to develop a comprehensive and resonant strategy that truly reflects the collective wisdom and aspirations of its stakeholders.

Table 14

First-Order Codes and Their Descriptions—Article 2 Part 4)

First-order code	Description
Multilingual Communication	Engages a diverse audience by breaking language barriers, thereby enabling a global spectrum of stakeholders to participate and contribute to the comprehensive strategy formation process.
Stakeholder Inclusion and Co-Creation	Invites a wide range of stakeholders to collaboratively shape the strategy and co-creating solutions.
Participatory Workshops and Commitment	Facilitates meaningful engagement through workshops, empowering participants to express their insights, align their commitment, and contribute actively
Master Connectors and Impulse Circles	Harnesses a network of enthusiastic advocates who play pivotal roles in connecting diverse stakeholders, fostering relationships, and driving engagement.
Global Collaboration and Transparency	Cultivates openness and shared understanding across global units, encouraging collaboration, and building trust by transparently sharing insights, strategies, and commitments with all stakeholders.

Visionary Leadership and Cultural Transformation. This refers to a leadership approach that focuses on communicating the CEO's long-term vision and leading efforts to transform the organization's culture in alignment with strategic objectives. This theme encompasses the integration of sustainability and impact initiatives, emphasizing CSR to foster positive and lasting impacts across various facets of the business. The proactive creation and dissemination of informative content, exemplified by a documentary, serve as effective tools for transparently communicating the strategy and its overarching goals. At the core of this approach is a globally deployed leadership model grounded in values of openness, impactfulness, interdependence, and authenticity. This leadership model guides the organization's transformation efforts, thereby shaping a culture that resonates with the strategic vision and

promotes collaborative alignment among stakeholders. Through visionary leadership and cultural transformation, the organization navigates toward a sustainable future by inspiring shared values, driving impactful change, and fostering an environment that fully embraces the strategic direction.

Table 15

First-Order Codes and Their Descriptions—Article 2 (Part 5)

First-order code	Description
Vision and Transformation	Conveying the CEO’s long-term vision and driving cultural transformation efforts to align with strategic goals.
Sustainability and Impact	Integrating CSR and sustainability initiatives to create positive and lasting impacts on various aspects of the business.
Communication and Education	Creating and disseminating informative content, like a documentary, to effectively communicate strategy and objectives.
Leadership Model	Globally deployed leadership model based on openness, impactfulness, interdependence, and authenticity

Strategic Alignment and Execution. Strategic alignment and execution signifies a cohesive approach to ensuring that the organization's strategic plan is both well-aligned with stakeholder expectations and effectively executed throughout the company. This theme encompasses a multi-faceted strategy. First, it involves engaging a broad range of stakeholders—including executives, managers, and shareholders—to ensure that the strategic plan resonates with their expectations and addresses societal concerns. Additionally, the theme highlights the importance of securing leadership buy-in, as demonstrated by the successful presentation of the documentary and the appointment of "master connectors" who play a pivotal role in fostering widespread adoption by overcoming initial resistance. The alignment of the strategic plan is further solidified through engaging workshops that are designed to inspire, engage, and empower employees to collectively commit to the plan's actionable initiatives. Finally, the theme emphasizes the execution aspect by creating an implementation support platform, which offers

comprehensive resources, guidelines, and tools to facilitate the successful execution of strategic commitments across various BUs. This comprehensive approach ensures not only strategic alignment but also effective execution, thereby fostering a collaborative and dynamic environment that leads to the realization of the organization's strategic objectives.

Table 16

First-Order Codes and Their Descriptions—Article 2 (Part 6)

First order code	Description
Stakeholder Engagement for Strategic Alignment	Involving diverse stakeholders—including executives, managers, and shareholders—to align the strategic plan with their expectations and societal concerns.
Leadership Buy-in and Overcoming Resistance	Gaining executive support by effectively presenting the documentary, overcoming initial resistance, and appointing "master connectors" to foster adoption.
Workshops for Employee Engagement and Commitment	Conducting workshops that inspire, engage, and empower employees to collectively commit to the strategic plan and its actionable initiatives.
Implementation Support Platform for Execution	Creating a digital platform offering resources, guidelines, and progress tracking to facilitate the successful execution of strategic commitments across business units.

Collaborative Alignment. Collaborative alignment refers to a comprehensive approach that focuses on engaging diverse participants and stakeholders in order to achieve a shared understanding and commitment to the strategic process. This theme encompasses several strategies. First, it emphasizes involving a wide range of participants to ensure the inclusion of diverse perspectives and promotion of alignment throughout the strategic journey. The formation of a steering committee further exemplifies this theme, as it brings together individuals from various facets of the organization to collectively identify the implications and consequences of stakeholder feedback, thereby fostering a holistic understanding of the strategic direction. Strategy formulation and validation, a pivotal aspect of collaborative alignment, involves synthesizing and organizing collected ideas into a coherent plan. Further, the steering committee's iterative rounds of validation and adjustment ensure that the plan resonates with the

diverse perspectives and expectations of stakeholders. This theme also highlights the establishment of ongoing communication channels, feedback loops, and supportive toolkits for facilitators. These elements foster continuous dialogue, engagement, and alignment throughout the implementation of the strategic plan, thereby reinforcing a collaborative environment that ensures the successful execution of the strategy and the achievement of shared objectives.

Table 17

First-Order Codes and Their Descriptions—Article 2 (Part 7)

First-order code		Description
Diverse Involvement	Participant	Engaging a wide range of participants to ensure diverse perspectives and alignment in the strategic process.
Steering Formation	Committee	Creating a steering committee consisting of individuals representing various angles within the organization to identify implications and consequences of stakeholder feedback.
Strategy and Validation	Formulation	Formulating the strategic plan by synthesizing and organizing collected ideas, with the steering committee revising the plan through iterative rounds of validation and adjustment.
Ongoing Communication and Feedback	and	Establishing communication channels, feedback loops, and supportive toolkits for facilitators, thereby ensuring continuous dialogue and engagement throughout the implementation of the strategic plan.

Ownership and Empowerment. Ownership and empowerment refers to a strategic approach that emphasizes transparent and inclusive practices, thereby empowering individuals across the organization to take an active and accountable role in shaping and executing the strategy. This theme encompasses multiple strategies. First, it highlights the establishment of a “Transparency Hub,” which is a central platform for sharing strategic information openly. This fosters transparency, engenders a culture of shared responsibility, and encourages active engagement from all participants. “Open Exchange Events” further contribute to ownership by providing opportunities for stakeholders to engage in open dialogues, fostering collaboration and a collective sense of responsibility in strategy development. “Empowered Ambassadors” exemplify this theme by creating networks of individuals within BUs who are entrusted with

leading the strategy's deployment, thereby enhancing employee engagement and involvement in the execution process. The creation of an “Action-Oriented Platform” offers a digital space where employees can propose and participate in initiatives aligned with the strategy, promoting a sense of personal contribution and impact. “Appropriation Workshops” play a key role in fostering ownership by designing sessions that inspire personal commitment to the strategy, thereby cultivating a culture of individual and collective responsibility. Finally, “Clear Communication” strategies ensure that communication resources are available and materials are translated, thereby enhancing the widespread understanding of the strategy and promoting inclusivity, which is vital for empowering all participants to embrace their roles and contribute effectively to the strategy's success.

Table 18

First-Order Codes and Their Descriptions—Article 2 (Part 8)

First-order code	Description
Transparency Hub	Establishing accessible channels for sharing strategic information, enhancing transparency, and cultivating a culture of shared responsibility and engagement.
Open Exchange Events	Organizing events that provide a platform for open dialogue with stakeholders, fostering collaboration, and building a sense of collective ownership in strategy development.
Empowered Ambassadors	Establishing networks of empowered individuals within different business units to lead the deployment of the strategy, enhancing employee engagement and involvement.
Action-Oriented Platform	Creating a digital platform for employees to propose and engage in initiatives aligned with the strategy, fostering a sense of contribution and impact.
Inspiration Workshops	Designing workshops that inspire and encourage personal commitment to the strategy, thereby cultivating a culture of individual and collective responsibility.
Clear Communication	Developing communication resources and translating materials to ensure the strategy's widespread understanding and engagement, thereby promoting inclusivity.

Appendix 4. Evidence of the Coding Process—Article 3

Pedagogy. Pedagogy refers to the art and science of teaching and learning. It involves creating effective learning experiences and environments to support knowledge acquisition and skill development. Pedagogy is evident in the manner in which the organization designed and utilized various tools and frameworks to support strategy implementation. The documentary "USEFUL" acted as an illustrated documentary, presenting real experiences and evidence of the organization's current practices and future strategy. It was intended for all employees, stakeholders, and other participants to understand the new strategy. The workshops, structured around inspiration, appropriation, and commitment, aimed to help employees determine their commitments to the strategy in their specific roles. The card game also played a role in educating and engaging employees, thereby making them aware of the strategic elements and the impact of such elements.

Table 19

First-Order Codes and Their Descriptions—Article 3 (Part 1)

First-order code	Description
Empowerment through learning	Providing opportunities for employees to learn and develop their skills, both technical and human, in alignment with the company's goals and values.
Participatory learning	Encouraging a participatory approach to learning in which employees can learn from each other and share knowledge across the organization.
Workshop facilitation techniques	Structured processes employed in workshops to inspire and encourage appropriation among participants, thereby enabling collaborative exploration and decision-making.
Educational resources	The provision of educational materials to support employees' learning and professional growth.

Understanding. Understanding refers to the extent to which employees comprehend the strategic plan, its goals, and the significance of their roles in the implementation process. The materiality of the artefacts, such as the documentary, the workshop, and the card game,

facilitated employees' understanding of the organization's strategic direction and the actions needed for its implementation. The documentary provided evidence of what the organization was already doing and the challenges ahead. The workshop enabled participants to explore the various pledges of the strategy and collectively reason and commit to actions. The card game enabled employees to visualize and grasp the strategic elements, thereby leading to a better understanding of their roles in the implementation process.

Table 20

First-Order Codes and Their Descriptions—Article 3 (Part 2)

First-order code	Description
Listening to Stakeholders	Actively listening to the perspectives and concerns of stakeholders during the implementation process.
Feedback mechanisms	Establishing feedback mechanisms to gauge understanding and address any misconceptions or uncertainties about the plan.
Visual representations of strategy elements	Using visual aids like cards and boards to represent strategic elements and create a visual context for discussions and decision-making.
Ideation and sensemaking	Structured workshops that encourage employees to generate ideas, make sense of the strategic plan, and connect individual experiences to the organization's goals.
Shared meaning	Creating a shared understanding and common interpretation of the strategic plan among all employees and stakeholders.
Mental models	The mental frameworks and cognitive structures through which employees interpret and make sense of the strategic plan.

Connections. Connections involve establishing links, networks, and relationships that foster collaboration, knowledge sharing, and collective action to support strategy implementation. The tools and frameworks used in the implementation phase fostered connections among employees. The workshops, documentary, and card game encouraged collaboration, cooperation, and collective decision-making. The platform functioned as a hub for employees to suggest, share, and coordinate actions related to the strategy. Further, master connectors and connectors were appointed to create a network of communication and

dissemination of information throughout the organization, thereby promoting the creation of connections among different BUs and departments.

Table 21

First-Order Codes and Their Descriptions—Article 3 (Part 3)

First-order code	Description
Ideation and sensemaking	Structured workshops that encourage employees to generate ideas, make sense of the strategic plan, and connect individual experiences to the organization's goals.
Shared meaning	Creating a shared understanding and common interpretation of the strategic plan among all employees and stakeholders.
Mental models	The mental frameworks and cognitive structures through which employees interpret and make sense of the strategic plan.

Cultural Transformation. Cultural transformation refers to the process of shifting organizational culture and norms to align with the strategic vision and foster a sense of collective purpose and commitment. This transformation encompasses the establishment of an open and transparent communication culture, fostering of collaborative efforts among employees, active inclusion of all individuals irrespective of their roles, promotion of knowledge sharing and recognition, and creation of a collective narrative. Furthermore, it involves the cultivation of an environment that prioritizes organizational learning from both successes and failures, thereby facilitating adaptation and evolution in response to changing circumstances. This cultural transformation is facilitated by the use of material artefacts such as a documentary and a card game, acting as vehicles to communicate the strategic plan, engage employees emotionally, and encourage commitment towards shared objectives. In addition, it encompasses a shift towards a culture of shared understanding, active participation, mutual support, and continuous learning, ultimately contributing to the successful implementation of the organization's strategic vision.

Table 22

First-Order Codes and Their Descriptions—Article 3 (Part 4)

First-order code	Description
Transparent communication	Cultivating a culture of openness and transparency in communicating the strategic plan and progress updates throughout the organization.
Collaboration	Encouraging teamwork and collaboration among employees to collectively work towards the successful implementation of the strategic plan.
Inclusion	Ensuring that all employees have opportunities to participate in the implementation process, irrespective of their roles or positions.
Knowledge-sharing and recognition	Recognizing and rewarding knowledge-sharing and collaboration to promote a culture of continuous learning and improvement.
Building a collective narrative	Material objects like the documentary and card game contributed to building a collective narrative for employees.
Organizational learning	Creating an environment that encourages learning from successes and failures, thereby enabling the organization to adapt and evolve in response to changing circumstances.

Belongingness. Belongingness refers to the sense of connectedness and identification with a group or organization. It involves feeling included, valued, and part of a cohesive community. This theme arises from codes such as collective awareness, community building, shared mission and values, transparent communication, inclusivity, participatory management, and participation. It signifies the creation of a unified sense of connection and affiliation, facilitated by transparent communication and active employee participation in decision-making, initiatives, and projects. This fosters a community-oriented environment where employees perceive themselves as part of a larger whole, driven by common goals and values. Consequently, employees experience a deep sense of belonging, thereby leading to higher commitment, engagement, and alignment with the organization's strategic direction.

Table 23*First-Order Codes and Their Descriptions—Article 3 (Part 5)*

First-order code	Description
Collective awareness	Employees all receive the same information regarding the strategy at the same time, creating a common starting point for implementation.
Community building	The strategy's emphasis on collective action and positive impact fosters a sense of community among employees, encouraging them to work together toward common goals.
Shared mission and values	Employees rally around a shared mission, fostering a sense of unity and common purpose.
Transparent communication	Transparent and inclusive communication ensures that all employees are informed and engaged.
Inclusivity	Creating an inclusive environment where all stakeholders' voices are heard, regardless of their role or position within the organization.
Participation	Encouraging active participation in various initiatives and projects
Participatory management	Employee involvement in decision-making empowers them to shape the execution of strategy.

Adaptability. Adaptability refers to creating an agile, learning-oriented, and feedback-driven organization in which employees play a central role. It involves fostering organizational agility, enabling swift responses to changing circumstances and priorities. A culture of continuous learning empowers employees to evolve and improve, enhancing their capacity to adapt. The iterative strategy adjustment involves fine-tuning the strategy based on feedback, promoting organizational resilience. Moreover, encouragement for specific actions via the implementation platform drives adaptability, thereby enabling employees to address emerging challenges. The dynamic implementation process, guided by employee-driven adaptability, ensures that the strategy remains relevant and effective in the face of evolving conditions.

Table 24

First-Order Codes and Their Descriptions—Article 3 (Part 6)

First order code	Description
Organizational agility	Flexibility enables rapid adaptation to changing circumstances and priorities.
Continuous learning	Employee adaptability is fueled by a culture of continuous learning and improvement.
Iterative strategy adjustment	Strategy adjustments based on feedback contribute to organizational resilience.
Encouragement to take specific actions	Employees encouraged to act on specific actions through the implementation platform, driving positive impact efforts.
Dynamic implementation process	Employee-driven adaptability ensures the strategy's relevance and effectiveness.

Legitimacy. Legitimacy refers to the establishment of credibility, acceptance, and authenticity for the strategic project. This theme is constructed from first-order codes including stakeholder consultation, developing a collective narrative, process openness, use of tools and frameworks to guide actions, and transparent communication. Legitimacy is cultivated by involving key stakeholders in the strategy's formulation, thereby broadening acceptance and ensuring its alignment with stakeholder interests. The development of a collective narrative through material elements encourages employees to internalize and embrace the strategy, thereby enhancing its perceived authenticity. The openness of the process, enabled by transparent communication and tools/frameworks, engenders trust among employees and enhances the project's perceived legitimacy. The use of these tools provides employees with a structured approach, thereby instilling a sense of purpose and direction that further legitimizes their actions in the context of the strategic project.

Table 25*First-Order Codes and Their Descriptions—Article 3 (Part 7)*

First order code	Description
Stakeholder consultation	Involving key stakeholders in the formulation and validation of the strategic project to gain broader acceptance.
Developing a collective narrative	The material elements of the strategy implementation foster a commitment to the collective narrative, encouraging employees to embrace the strategy as their own.
Openness of process	Openness in strategy formulation fosters trust and legitimacy among employees.
Use of tools and frameworks to guide actions	The tools and frameworks provided in the artefacts guide employees in taking action, fostering a sense of direction in their efforts.
Transparent communication	Being open and transparent regarding the project's objectives, progress, and potential challenges.

Leadership. Leadership within the context of the presented case study encompasses a set of interrelated actions and qualities that guide the successful implementation of the strategy. It involves influential communication, screening the documentary, workshops, and platform to foster shared understanding and commitment to the strategic direction. Leaders showcase real experiences and challenges, inspiring employees to contribute creatively to the strategy's execution. Strategic engagement entails leaders actively participating in workshops, thereby encouraging employees to envision and discuss the organization's strategic pillars. Supportive leadership includes providing guidance and resources to ensure the project's success. A guiding vision is presented by leaders, thereby offering a clear and inspiring outlook for the organization's future, thus enhancing employees' sense of purpose and direction. Leadership development focuses on nurturing and guiding "master connectors" and "connectors" to facilitate workshops and drive strategy implementation at various organizational levels.

Table 26*First-Order Codes and Their Descriptions—Article 3 (Part 8)*

First-order code	Description
Influential Communication	Effective communication through the documentary, workshops, and platform, which creates a shared understanding and commitment to the strategic direction. Showcasing of real experiences and challenges, inspiring employees to contribute creatively to the strategy.
Strategic Engagement	Leaders actively engaging with employees in workshops and encouraging them to envision and discuss the organization's strategic pillars.
Supportive leadership	Having supportive and encouraging leaders who provide guidance and resources for the successful implementation of the project.
Guiding Vision	Presenting a clear and inspiring vision for the organization's future, enhancing employees' sense of purpose and direction.
Leadership Development	Developing and guiding "master connectors" and "connectors" to facilitate workshops and drive strategy implementation at various levels.

Recognition. Recognition refers to acknowledging and valuing employees' contributions and achievements in various aspects of strategy implementation. Recognition encompasses acknowledging employees' dedication and proactive engagement with the strategy through participation in workshops and contributions to the platform's actions. Employees who assume leadership roles as "master connectors" and "connectors" are rewarded and recognized for their contributions to driving strategy implementation. The theme also involves celebrating the achievements of individuals and teams who successfully execute specific platform actions, reinforcing a culture of positive impact. Additionally, recognition extends to talent spotting, where employees are identified for their proactiveness and their role as connectors, thereby fostering their personal growth and development within the organization. The provision of recognition and associated career opportunities serves as an incentive for active participation, thereby engendering a sense of commitment and growth among employees.

Table 27

First-Order Codes and Their Descriptions—Article 3 (Part 9)

First-order code	Description
Performance Recognition Rewards Achievements Appreciation Talent Spotting	Recognition of employees' efforts in embracing and taking action on the strategy through participation in workshops and contributing to the platform's actions.
Recognition and Growth	Recognizing and rewarding employees who take on leadership roles as "master connectors" and "connectors" in driving strategy implementation.
	Celebrating the achievements of individuals and teams who successfully implement specific actions from the platform, reinforcing a culture of positive impact
	Identifying and recognizing employees who excel in their commitment to strategy implementation and their role as connectors, fostering their growth and development.
	Recognition and career opportunities incentivize active participation and personal growth.

Competition. Competition pertains to instilling a dynamic of healthy competition among employees to engage actively with the strategy and contribute to its successful implementation. The organization fosters a competitive mindset by showcasing its commitment to the strategy's positive impact, thereby inspiring employees to desire to be part of transformative change. Moreover, competition is fueled by recognizing and celebrating the achievements of both BUs and individuals who take meaningful actions from the platform to drive positive impact, motivating others to excel. The theme also encompasses encouraging a sense of competition among employees to generate innovative and impactful actions for the platform, thereby propelling the organization's strategic objectives forward. In essence, this theme leverages the motivational power of competition to drive engagement and foster commitment in strategy implementation.

Table 28

First-Order Codes and Their Descriptions—Article 3 (Part 10)

First-order code	Description
Competitive Drive	Encouraging a healthy competitive mindset by showcasing the organization's commitment to the strategy's positive impact, thereby creating a sense of competition to be part of the change
Performance Competition	Recognizing and celebrating the performance of business units and individuals in taking meaningful actions from the platform to drive positive impact.
Innovation Competition	Fostering a sense of competition among employees to come up with innovative and impactful actions for the platform, thereby driving the organization's strategic goals.

Empowerment. Empowerment refers to the process of enabling and motivating employees to take ownership and drive commitment towards successful strategy implementation. The collaborative nature of the strategy implementation generates a sense of purpose and motivation as employees collectively work toward a shared vision. Empowerment is facilitated by equipping employees with the necessary tools, knowledge, and resources through workshops, the documentary, and the platform, thereby enhancing their capabilities for effective strategy execution. Motivation agency encourages employees to proactively initiate actions and solidify their commitment through active participation in workshops and contributions to the platform. Additionally, empowerment manifests through the delegation of responsibility for driving strategy implementation to "master connectors" and "connectors," thereby empowering them to facilitate workshops and lead change initiatives. Furthermore, the organization's approach of granting employees a degree of autonomy and decision-making power in their roles related to the project contributes to their overall sense of empowerment, thereby ensuring that they are active participants in the strategy's success. This theme underscores the organization's commitment to nurturing employees' sense of ownership and agency in driving positive change.

Table 29*First-Order Codes and Their Description—Article 3 (Part 11)*

First-order code	Description
Building purpose through inclusion	The collaborative nature of the strategy implementation creates a sense of purpose and motivation as employees work together to achieve a shared vision.
Capability Development	Providing employees with the tools, knowledge, and resources through workshops, the documentary, and the platform to develop their capabilities for effective strategy implementation.
Motivation Agency	Motivating employees to take initiative and drive their commitment to strategy implementation through active participation in workshops and contributions to the platform.
Capability Development	Providing employees with the tools, knowledge, and resources through workshops, the documentary, and the platform to develop their capabilities for effective strategy implementation.
Empowering Delegation	Delegating the responsibility of driving strategy implementation to "master connectors" and "connectors," thereby empowering them to facilitate workshops and lead change.
Autonomy in Decision-making	Providing employees with a level of autonomy and decision-making power in their roles related to the project.

Appendix 5: Interview Guide

Theme 1: The interviewee's profile

Tell me about yourself, who you are, what you think is important to share with me.

- Company/Individual (HQ, BU, stakeholder)
- Position
- Background (education, experience)
- How long have you been with the company?
- What positions have you held and what position do you hold now?
- Do you feel you belong to the organization?
- Do you feel you can be authentic in your workplace?

Theme 2: The “We make it Positive” initiative

Tell me your story/experience of the “We Make it Positive” initiative.

- What do you know about the WMIP project?

Role/level of involvement

- o Conception
- o Facilitation
- o Participant
- o Connector

- When were you involved in the WMIP process?
- Was there a particular moment in the process that stood out for you? Why or why not?
- How do you feel you have contributed to this process?
- Were you consulted in 2019 via a questionnaire to express the topics important to you? Would you have done it differently?
- Did you take part in a strategy ownership workshop - face-to-face or online?
- What do you think of the documentary? The cards? The format?
- How useful was your role?
- What did your role facilitate?
- Accessibility (transparency)
 - o Tools
 - o Information
 - o Content
 - o People
 - o Communication around the initiative
- Was there anyone or anything in the process that facilitated your contribution to the process?
- Do you feel you had access to all the information concerning the process?
- Was there a time when you lacked information or skills to participate in the process?
- Inclusion

- o Diversity of profiles
 - o Opportunity to express themselves
 - o Consideration of opinion
 - o Decision-making
 - o Number of people included
- Did you feel that you were part of the WIMP process, its organization, the way it was implemented? (Being heard, having access to information, etc.)
- What contributed to this feeling?
- Did you feel you could be authentic in the WMIP process, its organization, the way it was run? What helped you feel this way?
- Do you think the right people were involved? Are the people involved the right ones?
- Who would you have liked to see involved? At what point? Why or why not?
- How do you think this sense of belonging/authenticity was fostered in the WMIP process?
- Decision-making
- o Centralized/Decentralized
 - o open strategy phases
- open strategy process
- o Pre-planning
 - o Different phases

- o Inclusive climate (meta-narrative, motivations, ...)
- Hautz dilemmas
 - o Exclusion
 - o Too much information
- What were the positive aspects of this process?
- Were there any irritants? How were they approached and resolved?
- Are you satisfied with the WMIP process? What would you have liked to see in this process?
- What would you have done differently if you had to do it all over again?
- Would you say that WMIP is a collaborative and open process?
- Would you organize an open strategy process? How would you do it?"

Theme 3: Implementing “We Make it Positive”

- How does the WMIP process help you implement the strategy in your day-to-day work?
- Do you think the collaborative approach to strategy creation is useful? Does it favor good strategy implementation?
- Do you have an example of how you implement strategy in your work?
- Do you have the means, skills, and information to implement the strategy?
- Are the connectors still active and present to animate the strategy after the workshops?

Appendix 6. Overview of interviews conducted and distribution of interviewees.

Organization code name	Interviewee code name	Job perimeter	Interview duration	Gender (M/F)	Managerial level	Company seniority (years)
BU1HQ	INT1	Supply chain & logistics	00:39:16	F	Employee	17
BU1HQ	INT2	CSR	00:50:23	F	Middle Management	14
BU1HQ	INT3	Internal and institutional communication	01:23:44	M	Team leader	7
BU1	INT4	Store leader	00:37:54	F	First-line manager	7
BU1HQ	INT5	Project leader HR	00:44:16	F	Employee	18
BU1	INT6	Department manager	00:28:09	F	Team leader	8
BU1	INT7	Department manager	00:31:40	M	Team leader	18
BU1	INT8	Department manager	00:35:21	M	Team leader	7
BU1	INT9	Store leader	00:30:09	M	First-line manager	14
BU1	INT10	Floor manager	00:13:54	F	Team leader	6
BU1HQ	INT11	CSR	00:29:30	F	Middle Management	12
BU1	INT12	Store leader	00:51:41	F	First-line manager	8
BU1	INT13	Performance	00:45:46	M	Employee	2
BU1	INT14	Store leader	01:02:03	F	First-line manager	13
BU1	INT15	Department manager	00:24:26	M	Team leader	13
BU1	INT16	Store leader	00:29:26	M	First-line manager	19
BU1	INT17	Store leader	00:29:40	F	First-line manager	25
BU1	INT18	Store leader	00:42:57	M	First-line manager	31
BU1	INT19	Store leader	00:21:32	M	First-line manager	9
BU1	INT20	Joint interview with two store leaders	00:58:21	M	First-line manager	20
BU1	INT21	IT	00:18:07	M	Team leader	8
BU1HQ	INT22	Compensation and profit-sharing	00:40:23	F	Employee	22

Organization code name	Interviewee code name	Job perimeter	Interview duration	Gender (M/F)	Managerial level	Company seniority (years)
BU1	INT23	Warehouse	00:27:07	M	First-line manager	4
BU1	INT24	Store leader	00:27:45	M	First-line manager	6
BU1	INT25	Store leader	00:27:13	F	First-line manager	26
BU1	INT26	Store leader	00:56:36	M	First-line manager	11
BU1	INT27	Store leader	00:42:19	M	First-line manager	34
BU1	INT28	Warehouse	00:34:14	M	First-line manager	19
BU1	INT29	Department manager	00:44:05	M	Team leader	11
BU1	INT30	Store leader	00:38:43	M	First-line manager	35
BU1	INT31	Department manager	00:36:05	M	Team leader	3
BU2HQ	INT32	Communication	00:27:01	M	Employee	3
BU3HQ	INT33	Health and safety	00:44:49	F	Employee	2
BU3HQ	INT34	Internal and institutional communication	00:42:18	F	Employee	17
BU3	INT35	Store leader	00:21:46	F	First-line manager	1
BU4HQ	INT36	Human resources	00:55:02	F	Employee	15
BU4	INT37	Department manager	00:28:47	M	First-line manager	4
HQ	INT38	Communication	00:37:31	F	Employee	4
HQ	INT39	Product manager: Digital data	00:16:22	F	Employee	7
HQ	INT40	Packing manager	00:57:37	F	Team leader	9
HQ	INT41	Project manager: Quality	00:31:05	F	Employee	7
HQ	INT42	Quality and CSR	01:14:21	F	Middle Management	5
HQ	INT43	Responsible development	01:24:49	M	Middle Management	29
HQ	INT44	Safety	00:41:30	M	Employee	22
HQ	INT45	Project manager: Human resources	01:04:19	F	Employee	22
HQ	INT46	Climate and carbon	00:54:14	M	Team leader	8
HQ	INT47	Project manager: Quality	00:35:05	F	Employee	11

Organization code name	Interviewee code name	Job perimeter	Interview duration	Gender (M/F)	Managerial level	Company seniority (years)
HQ	INT48	Marketing	00:26:08	F	Employee	4
HQ	INT49	Diversity and Inclusion	00:32:56	F	Employee	12

Figure 15

Distribution of Managerial Level of Interviewees

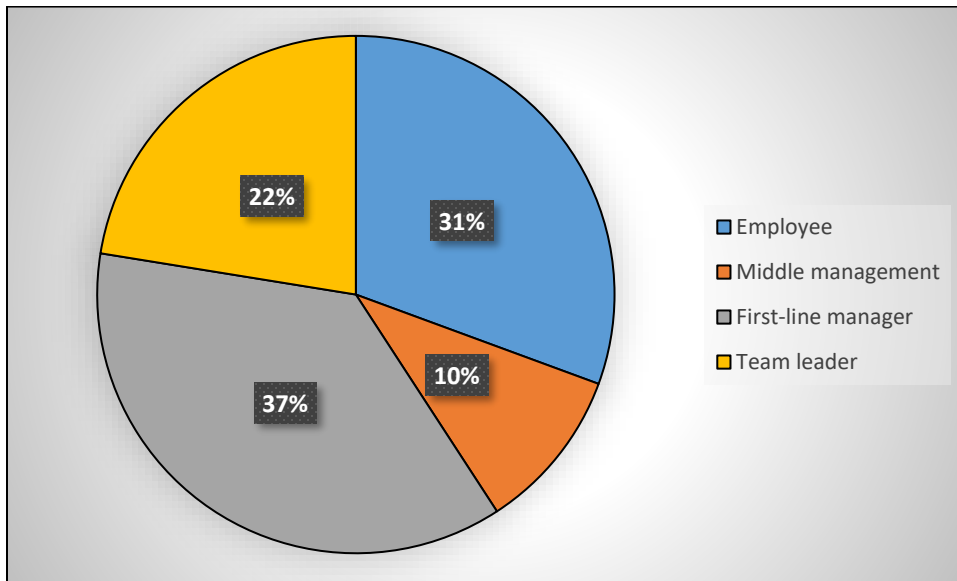


Figure 16

Interviewee Gender Distribution

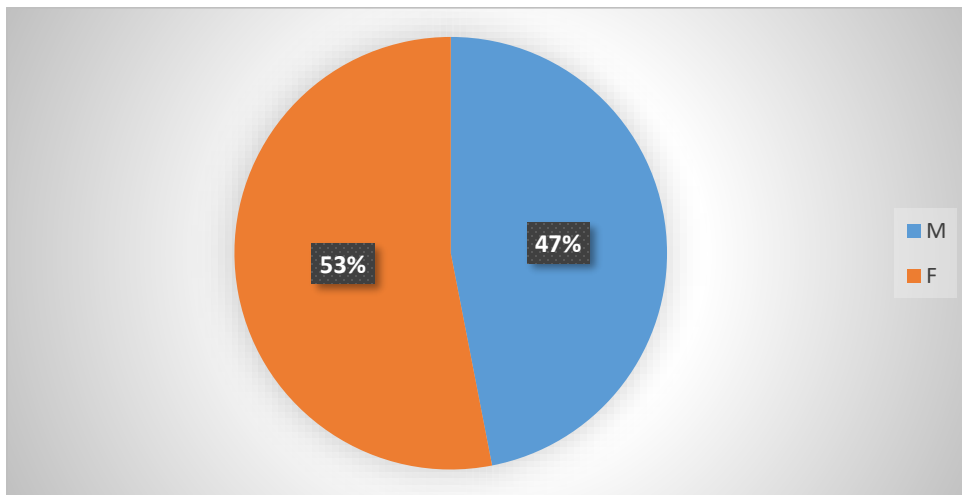


Figure 17

Distribution of Interviewees Across Business Units

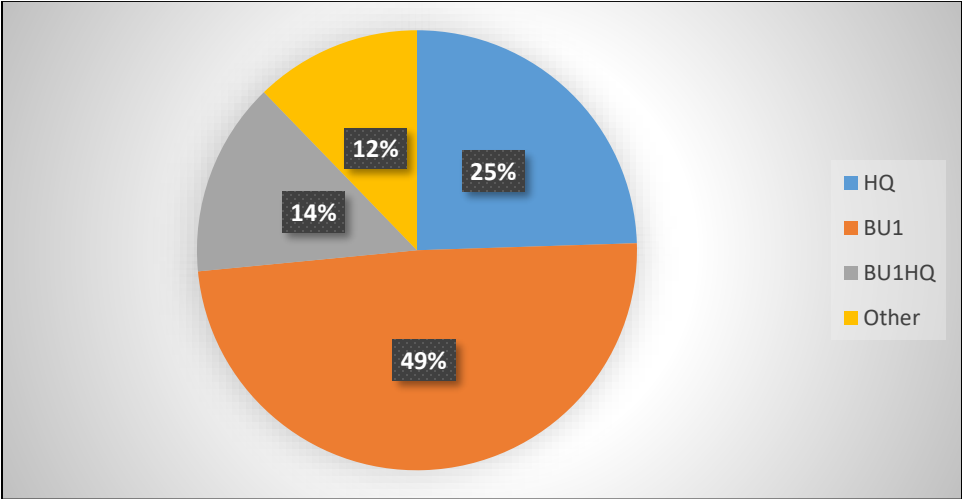
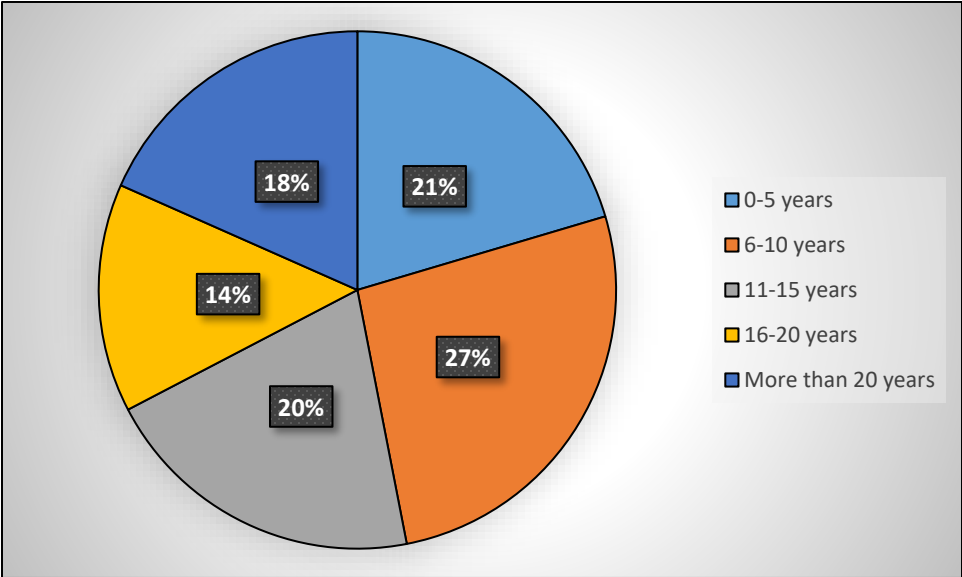


Figure 18

Distribution of Interviewees in Terms of Company Seniority



Appendix 7. Example of Consent Form

I, the undersigned, authorize David Montens Lataire to record and keep the exchange we had today within the framework of the partnership established between the IÉSEG School of Management and [REDACTED] through the collaboration agreement signed on May 28, 2021.

I have been informed of the use and protection of data

I have been informed of the possibility of making changes to the written report of the interview

Below is an excerpt from the aforementioned agreement regarding the use and protection of data:

Article 5: Use of data

The partner authorizes Mr. David Montens Lataire to exploit the data and to use them for publication purposes in his doctoral thesis, scientific journals, press articles, and any other support or media he deems relevant. The partner may not object to the use of the data collected by Mr. David Montens Lataire and may not object to the exploitation of the data by Mr. David Montens Lataire.

The purpose of the researcher's research is to study the practices and processes of so-called open strategic formulation. Mr. David Montens Lataire does not intend to harm the partner or to make a value judgment through his research work, which is a rigorous scientific work, and he commits himself to propose an interpretation of the data and of the people he met in future publications.

Mr. David Montens Lataire will present his research work under his own name and will not mention that the partner shares his viewpoints.

Article 6: Data protection

The data collected during this research project may be anonymized at the request of the different interlocutors of the researcher during the research project and more globally. Mr. David Montens Lataire may anonymize the identification of the partner's organization at his request.

For reasons of reliability and ease of exploitation of the data, Mr. David Montens Lataire may record his interactions with the collaborators in the form of a video and/or audio recording.

Prior authorization will be requested individually from the persons concerned. A restitution of each interview will be proposed to each person interviewed, who will be able to add to it or amend it if they wish.

The data collected during this research project will be kept by Mr. David Montens Lataire on his professional computer. The data will also be saved on the servers of the IÉSEG School of Management through a cloud backup of the data saved on the researcher's professional computer.

The data may be shared with the thesis supervisors, Ms. Caroline Roussel, Professor and Dean of IÉSEG School of Management, and Ms. Cécile Belmondo, University Professor at the University of Lille and made available to stakeholders involved in the research project, the thesis project and publication projects based on these data of the researcher. The data may also be shared with potential co-authors of the researcher (not identified at this stage) on the thesis

project or on future works not yet defined.

The data can be destroyed at the request of the partner as soon as the work based on these data has been published and no working document involving these data is in progress. Mr. David Montens Lataire will inform the partner and propose the destruction of the data.

On:/...../20..... In:

Signature:

Appendix 8. *Analyzing Artifacts and Agency*—Article 3

Article 3 delves into the analysis of material artefacts and their affordances to understand how they contribute to building organizational commitment. In order to integrate the artefacts within the overall analysis each artefact was analyzed separately. First by conducting a functional analysis that seeks to understand the purpose and intended use of the artefact, examining its design, features, and how it fits into broader systems or contexts to determine its functionality and intended role. Then, through a contextual analysis, which involves studying the artefact within its broader context, considering its relationship to other artefacts, the environment in which it was used, and the social practices or rituals associated with it. This analysis is summed up in the tables hereunder and presented following a common framework for comparability, developing five categories (purpose and background, structure and objectives, target audience, impact and outcomes, and limitations).

Table 30

Analysis of the Artifact: The Documentary—"USEFUL"

Purpose and background	The documentary "USEFUL" is an illustrated documentary created by the communication department under the supervision of the organizing team. It aims to present real experiences, facts, and evidence of the organization's efforts in Corporate Social Responsibility (CSR). The documentary also discusses the challenges the organization needs to address to find synergistic, inclusive, and impactful solutions, considering economic, human, and environmental aspects. The documentary was designed to be easily understandable by a diverse audience, including all employees, town mayors, suppliers, clients, and other stakeholders. It was produced in May 2020.
Structure and objectives	The documentary is structured to showcase testimonies and key figures related to the organization's CSR initiatives. It highlights the achievements of various business units, representing numerous nations and companies, while also ensuring gender balance. The primary objective of the documentary is to encourage first-hand knowledge of the organization's activities and future strategy. It aims to promote a comprehensive understanding of the new strategy among all stakeholders. The organizing team established a clear communication strategy to ensure the documentary's effective dissemination throughout the organization. Rules were set, such as showing the documentary during collective meetings, viewing it during working hours, and providing a communication kit for "connectors" to ensure consistency in the viewing experience.
Target audience	The target audience for the documentary "USEFUL" includes all employees, town mayors, suppliers, clients, and other stakeholders associated with the organization. The communication team aimed to make the content accessible to individuals from diverse backgrounds by avoiding complex language typically used among strategists.
Impact and outcomes	The documentary is intended to have a significant impact on the organization and its stakeholders. By presenting real experiences and evidence of CSR efforts, it fosters a sense of transparency and accountability. The documentary also educates stakeholders about the challenges the organization needs to address in its pursuit of sustainable practices. By providing 24 pledges developed from stakeholder consultancy, the documentary serves as a tool to align the organization's strategic plan with CSR objectives. The documentary's clear communication guidelines and feedback collection mechanism ensure a consistent experience among viewers while allowing room for adaptation to local contexts.
Limitations	The documentary highlights the organization's commitment to inclusivity and diversity. It represents various business divisions, nations, and companies, thereby ensuring gender balance in its content.

The documentary presents real experiences, evidence, and challenges related to the organization's strategic plan. It provides employees with a comprehensive understanding of the strategy's goals and the actions already taken by different BUs, fostering knowledge about the organization's collective direction. By showcasing existing actions taken by various units, the documentary empowers employees to see themselves as part of a larger community working

toward the same goals. It instills a sense of belonging and inspires individuals to take ownership of the strategy and apply it in their specific roles and departments. Moreover, the documentary serves as a tool for employees to learn about the organization's engagement and the rationale underlying the new strategy. This empowers them to act in alignment with the strategy and contribute to its successful implementation.

Table 31

Analysis of the Card Game

Purpose and background	The cards game was created as an addition to the "climate collage" workshop, which aims to explain the causes and consequences of climate change through an interactive three-hour session. The purpose of introducing the cards game was twofold. Firstly, it was designed to enhance participants' engagement and enjoyment during the workshop, thereby allowing them to be emotionally involved with the images and music and stimulate their imagination. Secondly, the game served as a tool to reinforce and imprint the key concepts and notions presented in the workshop, thereby ensuring participants retain and understand the information better.
Structure and objectives	The cards in the game were structured to communicate the organization's specific objectives and how they planned to achieve them. Additionally, the cards acted as reminders of the objectives throughout the game. They also featured landmarks, which likely served as points on the game board where the cards could be repositioned. The game intentionally adopted short implementation timelines to convey a sense of urgency and emphasize the severity of the climate emergency. By setting deadlines of five or ten years, the organizers aimed to avoid lengthy discussions about the urgency of the situation, as information delivered too late may be ineffective. Instead, they encouraged participants to take ownership and responsibility by making specific commitments to address climate change.
Target audience	
Impact and outcomes	The purpose of the game is not only to provide an enjoyable experience but also to imprint and reinforce the notions presented in the workshop. By engaging participants in a hands-on activity, the game aims to enhance their understanding and retention of the information about the organization's strategy. By incorporating the game in the workshop, participants have been more inclined to actively participate and share their ideas during different phases of the workshop.
Limitations	While the game has clear objectives and a structured framework, it also allows for exploration beyond its boundaries. This flexibility is intended to encourage creativity and open dialogue, giving participants the freedom to explore additional ideas and approaches. However, the effectiveness of the game in achieving long-term behavioral change or sustained commitment beyond the workshop is not yet measurable. Moreover, the need for facilitators with proper training and expertise to guide participants through the game effectively also slows down its dissemination.

The card game prompts employees to read and handle the cards, thereby promoting a deeper understanding of the strategy's elements. Through placing cards within the collective

"house" representation of the strategy, participants visually engage with the commitments. Further, the card game encourages participants to select commitments they resonate with, sparking discussions with others to find actions that can be collectively pursued. It empowers employees to identify actions that align with their values and contribute to positive impacts. By providing options for actions with different levels of impact and urgency, the card game empowers employees to select actions that suit their capabilities and preferences, thereby fostering a sense of autonomy in the implementation process.

Table 32*Analysis of the Workshop*

Purpose and Background	The workshop was developed as a means to deliver the message of the documentary, which aimed to inspire, inform, and engage participants in the organization. The decision to create a workshop was driven by the need to facilitate collaboration, encourage commitment, and provide participants with a platform to determine their individual and collective commitments as a brand, in their business, and within their departments. The workshop was structured around the principles set for the documentary, with an emphasis on fostering collaboration and re-articulation of key concepts.
Structure and objectives	The workshop was designed in three main steps: inspiration, appropriation, and commitment. These steps aimed to guide participants through a process of understanding and internalizing the documentary's content. The workshop included activities such as visioning the documentary, playing a specially developed card game, discussing emotions, and choosing pledges for commitment. The structure allowed for engagement in various forms, both face-to-face and online, and involved participants across different languages spoken within the organization.
Target audience	The target audience for the workshop was the organization's employees, with over 70,000 participants attending the 2.5-hour sessions by September 2020 and 110,000 by June 2021. The workshop was intended for individuals at all levels of the organization, spanning different business units and departments.
Impact and outcomes	The workshop had several intended impacts and outcomes: Reararticulating and raising awareness of the documentary's message. Fostering collaboration and a sense of togetherness among participants. Encouraging participants to commit to specific actions as a brand, in their business, and within their department. Providing participants with the tools and information to continue working toward their commitments beyond the workshop. Establishing a foundational understanding and shared framework for action within the organization.
Limitations	Limited time during the workshop to fully explore and address individual and collective commitments. The challenge of maintaining participants' engagement and commitment after the workshop, particularly given the dynamic and changing nature of organizational contexts. The potential for differences in understanding and interpretation of the documentary's message among participants, thereby leading to variations in commitment levels and actions taken. The effectiveness of the workshop in accommodating diverse languages, cultures, and backgrounds within the organization.

The workshop offers a structured platform for employees to explore the strategic elements presented in the card game. Through group discussions and card readings, participants gain a deeper understanding of the strategy's components and the potential actions they can take. By allowing participants to select the commitments they wish to act upon and challenge each

other to identify impactful actions, the workshop enables employees to internalize and integrate the strategy into their daily work routines. It encourages them to find personal connections with the strategy's goals and commit to specific actions. The workshop provides a safe space for employees to share their ideas and suggestions for actions, thereby empowering them to voice their perspectives and influence the implementation process.

Table 33*Analysis of the Implementation Platform*

Purpose and background	The purpose of the implementation platform was to address the challenge of turning awareness and commitment from the documentary and workshop into concrete actions, particularly in the context of CSR initiatives that required employee engagement. The background of this initiative was the need to ensure that employees across the organization were aligned and working toward the same positive impact strategy. The platform aimed to centralize and organize these efforts, provide guidance for action, and create a sense of ownership and accountability.
Structure and objectives	The platform was structured around five pillars and contained a repository of actions that aligned with the positive impact strategy. The objectives were to encourage employees to take specific actions, guide them in understanding the importance and feasibility of those actions, and provide a platform for collaboration and communication. The platform also aimed to empower employees by encouraging them to suggest new actions and enabling validation and development of those suggestions by designated business referents. In addition, the platform's template for action cards ensured consistency in conveying information, including action details, impact explanation, implementation steps, and contact information.
Target audience	The platform's target audience included employees across various levels and roles within the organization. There were two main populations: the business and market management population at the head office, responsible for higher-level strategic decisions, and the store population, representing a significant portion of the workforce. The focus was on encouraging participation and engagement from both populations, acknowledging that transformation and positive impact initiatives needed to happen at both the strategic and grassroots levels.
Impact and outcomes	The implementation platform had several notable impacts and outcomes. It provided a structured framework for employees to engage with the positive impact strategy, resulting in the registration of 3500 actions within eight months. The platform empowered employees to actively participate in strategy implementation, whether they were initially convinced or needed more motivation. By involving employees in driving various subjects and actions, the platform contributed to building organizational commitment over time. Additionally, the platform facilitated cultural transformation by emphasizing the significance of the store population in driving change and fostering a shared identity within the organization.
Limitations	While the platform had evident successes, there were certain limitations. The platform's effectiveness depended on the commitment and engagement of designated individuals, such as business referents and connectors, who were responsible for driving actions and spreading the strategy. Not all employees may have been equally motivated to participate, and the success of the platform relied on convincing a broad range of individuals to contribute. There might have been challenges in maintaining consistent engagement over time and ensuring that suggested actions were practical and aligned with the organization's broader goals.

The implementation platform served as a pivotal tool to bridge the gap between awareness and action within the organization's positive impact strategy. It provided structure, guidance, and empowerment for employees to actively participate in strategy implementation, thereby fostering organizational commitment and aligning behaviors with the strategic

objectives. The platform's success was evident in the large number of registered actions and the manner in which it empowered individuals with varying levels of commitment to contribute toward a shared goal.

Table 34

Analysis of the Agency of Connectors

Purpose and Background	The purpose of the "Connectors" concept is to facilitate the deployment and implementation of the company's strategy, which includes elements such as the documentary, the workshop, and the cards game. The idea is to create a network of individuals who will act as "master connectors" to spread the strategic vision and coordinate the implementation process across different business units. These connectors are designated by the general managers of each business unit, based on their experience with the workshop and their subject sensitivity, often linked to corporate responsibilities like HR or CSR. The connectors are provided with a workshop toolkit and instructed to plan the distribution of the strategy within the organization from September 2020 to June 2021.
Structure and Objectives	The structure of the connectors' role is hierarchical, starting with the "master connectors" identified by the piloting committee and general managers. These master connectors then designate several connectors within their business divisions. The connectors' objectives are to function as transmitters, spokespeople, and facilitators of the company's strategy. They are responsible for identifying relays for spreading the strategic vision and training these relays in workshop facilitation. The ultimate goal is to build a network of almost a thousand volunteer employees who actively participate in the distribution, creation, and transmission of the strategy.
Target Audience	The target audience for the connectors' efforts is the entire organization, including employees at all levels, CEOs, top executives, department heads, and shop managers. The connectors aim to engage and involve as many employees as possible in the strategy implementation process. They focus on creating a shared understanding and commitment to the strategic goals among organizational members.
Impact and outcomes	The concept of connectors has several impacts and outcomes. Firstly, it facilitates communication and creates shared meaning among different groups within the organization. The connectors function as mediators between material artefacts (workshop, documentary, cards game) and social practices, thereby shaping the implementation process. They enhance connectivity, foster a sense of togetherness, and build relationships within and between business units, contributing to a cohesive implementation process. The engagement and involvement of employees are enhanced through emotional connections created by the material artefacts, thereby leading to higher commitment to the strategic plan.
Limitations	While the concept of connectors offers a distributed approach to strategy implementation, it may have some limitations. One potential limitation is the heavy reliance on the selection and designation process of connectors. If this process is not well-managed, it could lead to the exclusion of certain perspectives or result in connectors who might not effectively engage the target audience. Additionally, the success of the concept relies on the effectiveness of the material artefacts (workshop, documentary, cards game) and the training provided to the connectors. If the material artefacts lack relevance or fail to create the desired emotional connections, the overall impact of the connectors' efforts may be diminished.

Appendix 9. Interview Extracts

Several extracts from six interviews are offered in the following sections, which I believe are critical to understanding the environment in which the observed process unfolded in the organization. These passages also provide insight into components that, while not necessarily discussed in the numerous sections of my thesis, have affected my understanding and interpretations as a researcher.

I selected the five interviews I believed were the most insightful. I have included only the excerpts I would like to highlight in this thesis. The timestamps from the interview have been retained as a reference point for readers to understand why there are time jumps in the transcriptions that follow and that the dialogue did not organically move from one question and response to the next.

Interview 1:

Table 35 reminds you of the general information regarding the interviewee.

Table 35

Extracts of Interview 1

Organization code name	Interviewee code name	Job perimeter	Interview duration	Gender (M/F)	Managerial level	Company seniority (years)
HQ	INT45	Project manager: Human resources	01:04:19	F	Employee	22

[00:00:00.060] - David

So, what I'd like you to do is to quickly introduce yourself and define what you do at HomeCo.

[00:00:10.110] - INT45

Okay, so today, at this very moment, I'm an internal facilitator. I'm involved in the organization of human challenges within human resources. My mission is to support groups, certain groups at certain key moments, which can be workshops, approaches, things like that, so that they can progress together and effectively achieve the results they want to achieve. So that's my job today in particular. And when I say that I'm in the human challenges teams, my playground can be HomeCo, or it can be one of its businesses, on the right, on the left and on any type of approach and any type of business.

[00:01:01.920] - David

Ok, great, so it's a function ... well the official title of facilitator that you've held for how long?

[00:01:10.470] - INT45

So it's not an official title because I can't put it on officially.

[00:01:13.890] - David

Alright

[00:01:14.800] - INT45

I'm declaring today now that it's an official title. Ahah. No, I've been doing it since 2019. That's it. And so, as part of "We Make it Positive," I've been working as a WMIP facilitator and I've been working in this state, in this project and in this way, and that's what I can say today.

[00:01:43.800] - David

Okay, can you identify why you can't make this title or position official?

[00:01:49.950] - INT45

Because it's a new job and HR administrative processes are not at all agile when it comes to adding new jobs. Because behind a job there's a little note—that is, a pay scale, a salary range, there's a mission, there's all that. And even though we've already drawn up the job description, etc., the difficulty lies in getting into the process. The difficulty lies in getting into the administrative process.

[00:02:15.150] - INT45

And it's only there, it's only there, at least for me, but right now, there's also ... So that's more subtle, I'd say there's the difficulty of recognizing these facilitation practices as professions, with this fear that there are many who say: I'm going to become a facilitator and that in fact they don't have the ability, the posture or it becomes a profession, or there are too many of them. So there's a bit of a fear of making it visible too. Although I'll never deny that these practices are

extremely useful. So for the moment, it's fine. And in my role as facilitator, I'm in the process of building up the mayonnaise of a community of internal facilitators, so I'm picking up people left and right who have mobilized a bit on their own, as if they were really.... They wanted to develop. We're working on training programs and things like that. And the idea is that there should be more and more of them, not necessarily doing it 100% of their time, but that there should be more and more people who supplement part of their activity with this role of facilitator-facilitator who can practice in contexts other than their team or organization.

[00:03:28.850] - David

Um ok.

[00:03:30.120] - INT45

It's a crazy job, yes, but it exists.

[00:26:30.000] - David

Do you see a difference, a usefulness in having done this strategy in a more collaborative and inclusive way than, for example, the "We Make it Happen" of earlier, which was necessarily more closed than this process?

[00:26:58.080] - INT45

I'll get back to you in a few months or years. I think that, quite honestly, the time has finally come for us to sow the seeds in a powerful way with 110,000 people. I'm not sure that 110,000 people are hyper-aware of having finally understood that they've been presented with the organization's strategy. I'm not sure. On the other hand, I hear—and this is really more in my inner circle, so there you go—"yeah, but that's not very "We Make it Positive." Yeah, but ... you

see, you're going to look for something that ties in with that. So where "We Make it Happen" has been foundational for the project, platform, organization, etc. part, it's been a real success. It talked a lot to managers and bosses who themselves had to develop their own strategy. On the other hand, "We Make it Positive" touched everyone, and it's easier today to link the actions that are taken regarding that than to say, well, if we're "We Make it Happen" ... no no, we're "We Make it Positive." And over time, over the next few months and weeks, I think we'll reap the rewards of what we've sown in terms of taking action, telling our story, and building mass momentum.

[00:28:15.330] - INT45

So it's not just that, but awareness. Like that, a little bit, I'm not going to say silent, but a little bit like that, which is there. Plus the awareness of the world citizen. I'm not just talking about France, by the way. Plus the injunctions of the economic world, and even politicians, to set standards and all that. At some point, we'll be able to move faster, and at some point, we'll be ready to move faster because we'll have that basis. So, in any case, the fact that we've done it collaboratively creates something that we'll see the fruits of a little later.

[00:29:48.150] - David

Would you say that it's driving more collaboration in the company for years to come or that it's just going to stay like that, a one-shot deal out of opportunity, or because of some external factor that made it so?

[00:30:03.870] - INT45

No, I think it made us realize that things could go faster when we reached the right targets and when we communicated the right messages to the right people in a collective way. I don't think

we can deny that. On the other hand, that doesn't mean that the same type of proto is implemented in the same manner everywhere... well, we don't do it the same way. COVID-19 has also helped us with distance learning. It enabled us to work differently as a team, so We've acquired this knowledge, to be able to work differently collaboratively, remotely. And that, too, is fundamental.

[00:39:03.130] - David

An angry question, maybe a bit if you had to do it all over again. Is there anything you would change? Or would like to do differently?

[00:39:15.930] - INT45

Well, I don't know... I'd almost say no, because it's been so difficult ... supported by a lack of artistic vision, with so much energy, that I think even if we'd done a project plan like we did, we wouldn't have succeeded. But I'm convinced of that. The fact of not knowing, of sticking together, of being very close to each other, in total limbo, with a complete lack of knowledge - and I mean that - a complete lack of knowledge of the basic issues. In other words, when we talk about CSR, we're talking about... and I've heard it, bees on roofs, and we're going to change the lighting in stores. Three years ago, I told you that too. Today, a little less. But you've still got the conscience, the real conscience, the slap, it wasn't everywhere. So today, we might be going faster, further, but back then it was because we were in a state of uncertainty that we were able to move forward.

[00:40:24.140] - David

So it's more a question of blurred content than blurred process?

[00:40:30.670] - INT45

Both ... I think the process we went through was the right one. It allowed us to go fast and far. Now, we were very much supported by ... so the CEO was very present, which means the more the boss's voice counts. We had a lot of support from Christian, who unfortunately had to wear two hats, HR and CSR, so he took on a crazy mental load. What's more, he wasn't at all an expert in CSR issues. So he's an HR man at heart, and CSR was the other thing they stuck him with. All the difficulties, so you see when you're dealing with someone who's not completely on board, you know ... ahaa. So the boss's voice counts for a lot. If we'd only gone bottom-up, we wouldn't have been heard. Even then, after two steering committees, we were able to present something collective to the GLT. So the first time, when we proposed the conclusions, the first conclusions, we weren't heard, we weren't listened to.

[00:50:06.700] - David

And is the fact of not having, the fact of not being able to convince the GLT on this element, potentially because there are external players who have this expertise, or at least this, this ideology that has not been integrated into the We make it positive or?

[00:50:30.990] - INT45

No, I think that, in fact, these people, in these spaces, the global leaders, but all business leaders have access to all the information in the world. You can get the best speakers and so on. They're not in denial, they're aware of it. Now, they're in a system in which they're told "you have to be excellent, in digital, excellent in product, excellent in economics etc.". And so they have paradoxical injunctions, and the company's economic system is stronger than their own personal

convictions. So what's missing today, and what we'll be working on over the coming months, is a ... Resuming this cooperative dynamic. Because in any case, the real issue is cooperation, which will make things strong, even in a world that's going to fall apart. If we cooperate, we'll be stronger. So if we can demonstrate that the collective is made strong, and when I say collective, I mean all collectives. The collectives of influence, the managerial collectives, the global leader team, the CEOs, the management committees, all that, all that, all those spaces are spaces that need to be collectively strong. And this is not yet the case everywhere, on environmental and societal issues.

[00:51:51.620] - INT45

Supported by, and here I come back to my little facilitators. Supported by support professionals in any case, who can help process this. It means being supported by people who know how to do it.

Interview 2:

Table 36 reminds you of the general information regarding the interviewee.

Table 36

Extracts of Interview 2

Organization code name	Interviewee code name	Job perimeter	Interview duration	Gender (M/F)	Managerial level	Company seniority (years)
BU1HQ	INT2	CSR	00:50:23	F	Middle Management	14

[00:03:05.110] - INT2

So I found the WMIP approach interesting, because in the end, if we did ... we adapted it a little for BUSINESS UNIT FRANCE, compared with what HomeCo had come up with. The idea is to use the WMIP approach to help people who want to contribute to this approach to emerge and play a role. Already by being the first vectors and therefore by being those who will work with their colleagues to run workshops, organize, facilitate and set up actions... They themselves, at the end of these workshops, will bring out the actions and be the first players in these actions, by getting their colleagues on board. And so, I was somewhat influenced by this theory which says that to transform an organization, to transform the world, you need 10% of people who are committed. And so I found the WMIP approach interesting, because in the end, if we did ... we adapted it a little to BUSINESS UNIT FRANCE, compared to what HomeCo had imagined. The idea is to use the WMIP approach to help people who want to contribute to this approach to emerge and play a role. Already by being the first vectors and therefore by being those who work with their colleagues to run workshops, organize, facilitate the implementation of actions... They themselves, at the end of these workshops, bring out the actions and be the first players in these

actions, by getting their colleagues on board. And so, I was somewhat influenced by this theory which says that to transform an organization, to transform the world, you need 10% committed people.

[00:14:04.000] - David

So, the main use, let's say, of going out and questioning stakeholders, is more for communication, at least about what the company is doing, rather than really adding value to what's going to be put in place afterwards, if I understand correctly?

[00:14:21.000] - INT2

Well, yes and no, because you're never safe from a good idea, and the point of listening to stakeholders is also interesting, because it's how they perceive us. So what they say is a reflection of the image we project. And that's always interesting, because when you're in the structure, you're not always very clear about the image you project. In any case, at Business Unit France, we often have a rather demanding view of ourselves, and so we often have a view which isn't necessarily ultra positive. Seen from the outside, the view is more positive and external, so it's a mirror, freer from internal constraints. So I wouldn't say that it's just a question of brand, image etc... Now, the reality is that we know the company well, and when you know the subject well, because I knew the positive subject, well then, the testimonials that emerged weren't scathing either from my point of view. But they could have been brought back to someone else, who has less depth in the appropriation of the subject and so on. You see, it's more like that, it's more my view, rather than the view of the project itself, which was pretty accurate.

[00:16:01.000] - David

Ok. do you feel you need to know how it all went down and who was involved, to a little better be able to own the various engagements or not?

[00:16:20.000] - INT2

I know a bit about how it was done. So I was pretty well informed. Should I have been more involved? I think that ... well, that's my opinion, but in any collective construction process of a project, at some point, there has to be a small collective that decides, that makes decisions, that gives singularity, that makes arbitrations, and that's not something you can do with 150 people. And that can't be done by 150 people. So I find that, in a process of strategy emergence - and I've worked in the same way - at the end of the day, people have to take on responsibilities, take on singularities, take on more singular acts. Because the power of the collective means that it doesn't always work spontaneously. And so, after a while, I think there's also a minimum ... well, it's up to the company's managers, those who are perhaps a little more enlightened than others, to take strong positions on the basis of all the creativity that may have taken place, and they can draw on this creativity and, at the same time, strike the right balance between what needs to be done and their expertise and the creativity of the group. Objectively speaking, I'm not shocked or disturbed by the fact that I'm not involved from start to finish in the process.

[00:28:25.000] - David

And what do you think it has to do with not being able to find that impactful element?

[00:28:22.000] - INT2

Well, I think we might be ... well, that's my analysis. But I think we're a bit victim of a lack of maturity on the subject. In other words, for us, there are subjects that we're presenting now, that other companies have been working on for a very long time. So for them, they've become non-topics. Let me give you an example: reducing our in-store waste is the number one irritant for our in-store teams. Because that's what they see every day when they put products on the shelves, all the plastic and cardboard packaging they put in the garbage can. So for them, it's very important. So if you don't talk to them about this, which they see every day... well, basically you're not responding to their first irritant, their first expectation of the company, which is to reduce waste. And yet we all know that that's not what the environment is all about.

So we also have to talk about energy renovation, solidarity workcamps and so on. So I think that, because of our lack of maturity and self-confidence, we talk about everything. We talk about everything, but at a time in our lives when, in addition, we're no longer in the era of greenwashing, eco-label paints and so on. We're at a time when environmental impacts are going to completely overturn the business model. So what I'm talking about today is ... but not in all ... how shall I put it? Shaking up the company's economic model means inventing a company where tomorrow our profitability won't be based exclusively on the sale of new products, but on the profitability of new consumer alternatives. It's very strategic, and it speaks to me and to our bosses. But for a sales advisor, for a customer service hostess ... the customer service hostess, what's important for her is that we stop printing receipts at the checkout. What's important for her is that we do the solidarity rounding at the checkout. For a logistics employee, what's important is So today, you see, depending on who I am, if you talk to me about changing my business model etc... that's it. Okay, but I'm not there yet. And so I think we're at that point in our lives,

where we need to respond to very concrete actions that we haven't yet cracked and on which our employees have been waiting.

And we know just how much we need them to feel that the issues they're waiting for us to address are actually happening. And they need to feel that we're doing away with cash register receipts, that we're doing away with rounding in boxes, that we've done away with plastic packaging for tiles, etc. And so that's where the transformation comes in. But for us, transformation also involves much more structuring stuff, which also takes longer to arrive. And we talk about them, but they don't necessarily see the first fruits of their labor. So we're kind of in that in-between period. And I think that in a year's time, maybe, we'll be able to talk about the thing a little better, because we'll be able to illustrate with very concrete actions things that are a bit lofty, but that will make sense to them, because they'll see

[00:32:04.000] - David

So, I'd like to ask you about the usefulness ... or at least the sense it makes to involve these different stakeholders, the employees too, in the listening that's been done, to create this WMIP approach, which in your opinion lacks a bit of strength, but lacks a bit of strength because we're obliged to integrate things that aren't necessarily of a strategic nature. But is it really worth it for you to include these different stakeholders in the construction of strategies in fine?

[00:32:21.000] - INT2

Well, for the reason I told you at the beginning. That is to say, I'm convinced that everyone has to change in their mission, that everyone's mission is going to be impacted in some way by the company's environmental and societal impacts. So, in fact, we're talking about a cultural change.

We're talking about a cultural change. Here's an illustration: I've just come out of a meeting that

took a little while, where we were saying we've got our parking lots, there's nothing but concrete, and when we create new parking lots, we plant trees and so on. And we still get - well, it's less and less true, but still - store managers who will come and cut down a tree, because it'll give them a better view of the store from the road, and so it's more commercial, etc. Except that we know that, today, we can't do that. Except that we know that today, our challenge is to have more and more trees in the parking lot, because it helps to reduce CO 2 emissions, it's green and there are all sorts of virtues to it, and so on. But if I want the store manager to stop cutting down a tree that we've taken the trouble to plant, he has to understand that the company wants to contribute to a greener urban environment. And so, yes, we want and we accept to have fewer parking spaces on which we'll put more trees. And so, for me to get a store manager - and this applies to everyone in their job - to get involved and take on this role. Well, he's got to make the strategy his own and say, "Well, how can I contribute? And that's okay. And frankly, I was very comfortable assuming that the first actions to emerge would be to put a beehive on the roof of the store. Frankly, that's not what's at stake for us, but it doesn't matter, it's a way of taking action, and once the hives have been put in place, we can move on to other things.

[00:37:32.000] - David

I'd like to come back to the questions I asked you at the beginning, about the feeling of belonging and authenticity. So, with regard to the WMIP approach, do you feel you belong to this process?

[00:37:50.000] - INT2

Well, yeah, I feel like I'm part of the process, because I've been given a bit of autonomy to make it my own, Business Unit-style. I got involved and so I made it my own, but ... I didn't

revolutionize it. But as I felt that we ... well, as HomeCo opened up the possibility of doing it, it enabled me to take greater ownership of the approach. I was the one who officially launched it in the company. With the CEO, we did a live event to launch the approach, calling on the CSR relays and so on.

[00:38:29.000] - David

Did you feel you could be authentic in the process?

[00:38:35.000] - INT2

Well, definitely. I have the feeling of being authentic, I have the feeling you know ... I told myself that ... it has to make sense too because ... for example in the useful workshops, quite quickly there were stores saying “Oh well, we'll provide goodies etc.” But for many of them, goodies are just a normal part of the business, not at all eco-friendly. So I said to myself, no, we're going to fight against that, and instead we're going to make sure that it makes sense, and so for each employee who participates ... that's what I suggested to my boss, and he accepted. So, for every employee who takes part in a useful workshop - and there are 25,000 of us - we'll donate €10 to an association working to combat poor housing, which is one of our primary battles in the home furnishings market. And we'll be donating €250,000 to habitat humanisme. And so I proposed it and it went ahead. And so, frankly, it's things like that, where I say to myself I was authentic, because I was aligned between the project, the way ... well, we weren't perfect on everything, I'm not saying that, but in any case, we went all the way. And I was fine with doing things that way.

[00:39:39.000] - David

Perhaps we'll move on a little earlier now to questions about the implementation of the process, the approach, in other words, how the strategy has been implemented in the stores in concrete terms. Do you think that this whole process, the collaborative approach, listening to stakeholders, ownership workshops, etc., has a real impact on the implementation of a strategy?

[00:40:16.000] - INT2

Absolutely! Because even if, in the end, you see, as I was saying earlier, basically the translation of this strategy is chiseled out by a small collective, which chooses the words, which chooses the priorities etc., you're not really involved. You know that you're part of a collective movement, that there's support, that everyone has the same experience, the same level of culture. You create a story, a collective narrative in fact. You create a collective narrative, and so I'm quite convinced that this facilitates buy-in, understanding... And it can even generate frustration, because at the end of the day, the company doesn't move fast enough...". She gave me the floor, I expressed myself, she said "I'm going to do this, but I'm still not doing it". And so I think this has even... it generates demands, and even frustration too. You don't go at the right pace, you don't take on the right level of ambition ... of ambition yes in the things you commit to.

[00:41:40.000] - David

So, in relation to this frustration and the fact that you were talking earlier about the documentary being a little too high for them, etc., is it counterproductive for the collaborators to say "I can't find my way around it. Is it counter-productive for employees to say to themselves, "I don't understand the documentary, I understand why it's there, but I don't see how it impacts me directly"? So how do you respond to these frustrations?

[00:42:18.000] - INT2

I think a lot of employees appreciated the fact that the company said to them "you spend 3 hours where you're not on your mission. And you open up, and we tell you we're opening you up to the world and giving you the chance to think about how you can get involved and so on". So the sequence had this positive virtue for everyone, or in any case for a very large majority, of saying "that's good, the company is taking us elsewhere, enabling us to do something else, opening us up and giving us the means to do something else". So that's the virtue of it. After that, I don't know if it's linked to the documentary, or once again, if it's linked to the fact that we're projecting ourselves, etc. But if the very next day nothing happens in my store, that inevitably generates frustration among those who are already impatient on a personal level for the company to move quickly. And impatient employees who feel that the company isn't moving fast enough, who say "it's just more promises, but there's nothing behind them, there are still inconsistencies etc.", inevitably generate frustration among the most committed, some of whom have left the company in the meantime to do jobs that are much more meaningful to them. And that, and the fact that we were also in the COVID period, also generated personal disengagements, life changes and so on. So I think you're bringing the two together in parallel, and so that ... but a fairly small margin, eh, but among a margin of employees, it was without ... how can I put it? No animosity or anything like that, but saying "we're a big liner anyway, and it's not moving. And you tell us that, but in reality, we're still doing that, I'm still getting lots of plastic in my store in the morning etc...". It hasn't changed, it hasn't transformed the company, and that takes time. And it takes time to make people understand that this documentary is high, it's beautiful, but that the work ahead of us can't be done in a snap of the fingers. The transformation of everyone's job is taking place at every level of the company. And since we've made communication 100%

corporate ... well, the product manager who refers to a product packaged in plastic ... by the time he realizes that the product, he has to ask his supplier to stop packaging like that and find a solution, etc. ... Well, of course there are me. And so to get the whole company on board at the same time, at every level of the company ... where not everyone has the same levers for action ... well that generates frustration in certain places. And this applies not only to stores, but also to internal departments, when a product manager says, "Okay, the company says we need eco-designed products, but I'm still incentivized on purchasing gains for my products. But if I'm looking for purchasing savings, maybe I'll be encouraged to buy a product far away, and not necessarily in France, and maybe it's better that I buy it in France. So how do I personally manage this contradiction? And that's it.

Interview 3:

Table 37 reminds you of the general information regarding the interviewee.

Table 37

Extracts of Interview 3

Organization code name	Interviewee code name	Job perimeter	Interview duration	Gender (M/F)	Managerial level	Company seniority (years)
BU1HQ	INT3	Internal and institutional communication	01:23:44	M	Team leader	7

[00:07:32.490] - INT3

Well, I see my job not just as someone who produces communication, and I try to get my team on that track a lot. But as communicators who understand what's going on at the top and at the bottom, and who are capable of synthesizing it not only to produce communication, but also to influence the company, and thus make communication not just an end in itself, but also a launching pad,

In other words, when you're designing a strategic project, whether you're a managing director or any other position, you need to integrate communication into your initial thinking, i.e. the ability of the public to understand and adhere to the strategic evolution you're going to propose to the company. I've seen too many things crash or semi-crash, or only average successes, because they didn't take into account the fact that the very intelligent elements you put on the table had to be understood, integrated and deployed if they were to succeed. That's a bit of a caricature.

[00:11:19.070] - David

Overall, would you say you have a sense of belonging with the group you work in?

[00:11:27.290] - INT3

Uh me personally, yes. Yes yes yes yes clearly yes yes yes I feel because I consider that I live the values of Leroy-Merlin France on a daily basis while accepting the contradictions. There are lots of things that can be managed. We're a big company with 28,000 employees, and we're undergoing major changes. So the company can sometimes bend people a little, less than in other companies I've known, but it happens. So you're dealing with a bit of a paradox. But yes, yes, I feel attached to this company because it has values that correspond and that we have in common, and values that you won't find in every company. I'm thinking in particular of autonomy. So you'll notice that the BUs don't necessarily have the same values as the group. Yes, it's not a paradox because we all have different histories. And Business Unit Russia is not Business Unit France, in fact even the business models are different, so that's perfectly understandable.

[00:12:33.440] - INT3

But at Business Unit France, autonomy for example, it's a value that's quite astonishing and which is undoubtedly in occurrence, among all the values of I think I know them more by heart, but you have respect, you have autonomy, sharing. Anyway, we're not going to go through them all, but autonomy is typically a value that's lived on a daily basis and that you feel is anchored in fact, including in the daily lives of people in the store. In fact, it's lived more than it's proclaimed. So for me, it's one of the elements that ties me to the company, in other words, its constant alignment or search for alignment between what it proclaims to be and what it is, what it tries to be. And that suits me fine. As a result, I'm very attached to this company.

[00:13:44.030] - David

So, you were saying earlier that there was this paradox between this feeling of belonging, but sometimes there are things that are contrary, that can hinder this feeling of belonging, do you have an example of this?

[00:14:09.850] - INT3

I can't give you a specific example of a person who would feel ..that's it, because I don't know what goes on in people's heads. I'd say that a company with values that, how shall I put it, are those of a family-owned business, with a century-old company, an almost century-old business, where relationships are extremely important, and so on. A company like that, its values are very much based on relationships, which are very human values. They are put to the test by the company's transformation cycles, and therefore today by the company's transformation cycles. It's both to bring it to levels of operational excellence in what is now its core business - the web, supply chain delivery, and so on. That's about it. And the relationship and at the same time to make it shift and is to remain a leader, i.e. a company that reinvents the business, that proposes new things, not one that copies the others, and so on.

[00:15:18.700] - INT3

So all that puts a lot of stress on the box. And so when you have your values, I always come back to that, because it's a bit of a foundation. But you could also take the leadership model you need to know about. It's the same, it's the same thing, you'll find the same things in interdependence in fact, or openness. It's not always easy to tell yourself that you're being respectful, that you're empowering people, and so on. But building a company is nothing new. But the transformation

of the company requires very strong managers to say to people, "Here's the framework and now you're going to play within it", whereas before, the framework was "You satisfy your customer and you make the right decisions to make money at the top". And so there was, and I come back to this, the value of autonomy, she took a ... you see, it had a much broader and more fun framework. Today, this is less the case. We're much closer to the way companies operate, which have....

[00:16:27.670] - INT3

You see, when we ... when we implement OKRs, you know what I mean? objectives and key results. When you implement this type of method in your company and you point out that a company like Google has always worked with this type of method. What we're interested in here isn't the modern aspect, it's the effectiveness of the method, and agile methods are extremely demanding in terms of alignment and discipline. These are not the values of the company at the outset. It's a very oral company, a bit of a mess, a bit of a... uh huh. And we're in the process of trying to sort out what's not going well, while at the same time trying to maintain—and I think this is really important—what's made it so successful—that is, the ability of our people to make the right decisions, I'd say. So yes, there are contradictions like that, and I think that, at all levels of Leroy-Merlin, France, when you're ...

[00:17:38.890] - INT3

When you're waiting ... Whether you're a store manager, an area manager, an employee in an internal department or in a store or warehouse, it hits you at every level. The job of a store manager today is not the same as it was ten years ago. And there are a lot of people who understand that and who take it on board. And I think we have the level, the management level,

to deal with this kind of complexity. So there's nothing to worry about. But to answer your question, it just illustrates the fact that the company also manages this type of paradox, it manages this type of tension and occasionally contradiction.

[00:20:53.770] - David

That's okay, let's move on to your story and your experience with the "We Make it Positive" initiative. So first, just how would you describe it and what would you say about it? How would you define this approach?

[00:21:17.470] - INT3

How I talk about it. I'll talk about it by saying that it's an approach that's both powerful and at the same time very HomeCo in the way it moves forward and a little very Business Unit. In other words, the group's guidelines are strong and high. Obviously, it's pure corporate. What happens next? Well, it all depends on how demanding we are on the various BUs to develop their own We make it positive model within this framework. And that's really interesting. But you see, it's both guiding and at the same time, well, I can tell you about it, I think. We were working on language elements with Isabelle Gascon, HomeCo's marketing director. Elements of language for the press. We're finding it hard to come up with very concrete things, within HomeCo's framework, within the Group's framework. After that, when you get down to BU level, you may find things more interesting, but uh, I was using that example.

[00:22:29.330] - INT3

When Ikea wants to appear as a company that's really invested in terms of sustainable development, it puts 1 billion euros on the table and announces. They say, we're going to invest 1 billion euros over the next four to five years. So there are some very concrete, very positive

things, but we're not there yet because, as is often the case with HomeCo and Business Unit, um, there's an aspect, we're setting very strong expectations, very strong intentions. Why is that? Because they're embodied, because you feel that behind them there are managers who want to do it, and then the movement will first be based on the human aspect, and then it will become part of the strategy and be implemented. But we're not in the process of saying, here we go, we're going to put 1 billion euros on the table to redo all our stores, we're going to postpone production, and so on. So I'd say that's both the strength and the weakness of the movement. And the feeling I have is that it's going to happen.

[00:23:27.020] - INT3

It's going to become clearer and the level of requirements is going to increase, not as we go along. I think it's going to increase fairly quickly in terms of what the Group expects of its 150,000 employees in terms of "We Make it Positive, but it's going to do it as I just said, it's not going to do it in a purely top-down way. It's also going to do it by listening, by integrating the needs of the BUs and so on. So that's the first thing I can answer to your question. The second thing is that I'm going to talk about Business Unit France. I think that Business Unit France has been sociologically ready for a long time now. Since we've done, we're on our third vision cycle. I don't know if you're familiar with Vision? And that the subject of sustainable development in 2016–2017, so when we set the vision 2025, it was extremely strong in the expectations of employees, in the ideas they put forward, and so on. So I think sociologically we're ready. The subject had been somewhat diluted in a certain number of vision postures I'd say, because in my opinion, Business Unit France wasn't ready to integrate it as a core business. What has changed is that the company is now ready to do so.

[00:24:51.080] - INT3

But we have employees who are growing on it and so we have a particularly favorable breeding ground. And I think that the big challenge is going to be our ability to integrate We make it positive in the business, in other words, the company's social commitments, its ability to be a player in the regions, a player in its preferred areas, beginning with energy renovation. But there are others, I have no doubt about that; they already exist, we just need to put them in order, give them impetus, and so on. On the other hand, the fundamental issue is going to be OK, leader in home improvement. Very well, "We Make it Positive," very well, how do we mesh the two? Because otherwise, the risk is that if "We Make it Positive" doesn't allow us to invent a new business model, a new company model. In fact, we're going to stay with this thing, a box like the others, so we feel that the will—and it's even a necessity beyond the will for the company—the will is still to make it an element of in-depth transformation of the group and therefore to give it a new tint, a new style, and, therefore, a new business model.

[00:33:23.730] - David

I was saying, what do you see as the starting point for the "We make it Positive" approach?

[00:33:40.520] - INT3

That's a good question. I'd say it's a realization on the part of leaders, perhaps a realization, how to say a little ... not spontaneous, that's not what I mean, because it didn't just happen. But at about the same time, everyone came to a certain number of conclusions, including the shareholder. It's not just the management, it's also the shareholder. That, at some point, the linear production model: I build a product with raw materials, I sell it, I destroy it. It was no longer tenable, and so we had to think about the evolution of the company. And so I think that

there was an awakening, all that, a little at the same time, with managers and shareholders who gave themselves the means, in fact, to understand that we trust the most active among them and the most convinced among them to implement this little music there and make people grow, make the idea grow in people's heads.

[00:35:08.480] - INT3

If I remember one, I had the chance three years ago, three years maybe of ... I think it was three years ago when, at the instigation of, at the instigation of Acts & Facts, the cross-disciplinary thing. They had Jean-Marc Jancovici come to HomeCo's auditorium, and it wasn't just HomeCo, it was HomeCo's auditorium, but there was Auchan, there was Kiabi, there were some of the shareholders too, and it had ... you know, clearly if they'd done that. If they'd organized this conference, it was to shake things up on the subject. That's pretty brave in itself, even if not everyone was there, et cetera. It was pretty brave in itself and I ... On acts like that, you say yeah, there's a willingness to get off our asses on the subject, even if we don't yet know how, we don't yet know in what direction. You feel that there's the beginnings of an alignment between the shareholder base, the management team, etc.

[00:36:35.640] - INT3

Those who were most in the forefront were the collaborators. As is often the case with this type of question. And at Business Unit France, it was quite powerful, and you could feel it not just in Vision. You can feel it in everything that comes out of the stores, the initiatives that are taken, the local partnerships with associations, the actions of the employees, etc. All that is It's all ... You can feel that there's a spontaneous movement here, which is quite powerful, and so I think it's born of that, it's born of an alignment, that's all. And then there are the leaders. I think the

CEO is someone who conceptualizes in a very strong, very intelligent way, and who makes a very good link between what his group is and this kind of high concept of sustainable development. So there was this step to take, which isn't a natural step at Business Unit: conceptualization. And the fact of having taken it, and of feeling that there was a different will behind it, also freed up a lot of energy, a lot of intelligence on this subject.

[01:14:43.660] - INT3

And that's very concrete. It's like what I was saying when I told you that communication... what's important isn't what you have to say, it's what people are able to hear. It's exactly the same thing. You can have the most intelligent strategy in the world if it isn't integrated by the employees and if they don't have the time to implement it, then it's useless, there's no point in being intelligent and right. So I'd say that there's a gestation period that's essential, and then there's the cadence, the deployment of decisions that are taken so that they can be integrated by the teams. So the subject is always present in our speeches, perhaps sometimes a little too much so, because we're still lacking the ultra-concrete parts that will be deployed in stores. But they are coming and they are already there. Take the example of the almost perfect corners, where we sell out-of-date products. That's new, that's hyperconcrete, it's been deployed in all the company's stores, so it's not 100% yet, but it's in the company's OKRs and so it's in step with them.

[01:16:53.170] - David

Yes, yes, absolutely. We're just about at the end of an interview, so my questions for you. Is there anything we haven't talked about together that you think is important to share with me?

[01:17:18.390] - INT3

Not things I haven't already said, but perhaps I can take this opportunity to insist on the fact that for me, from where I see things, the keys to the success of the approach are going to be in its consistency over the long term. Consistency doesn't mean that you start with a vision and don't change it for 10 years. It doesn't mean that. It's the authenticity and sincerity of the actions of managers, right down to the bottom of the company. Permanent alignment—in other words, since we've decided that this is what's most important, we put all our efforts into it, and so we draw up a framework and really come and explain to people who step out of the framework that this isn't the right thing to do. So, permanent alignment and its integration into the core business are ultra-important, and will enable us to manage the paradox that could be fatal to our approach, namely that our business is natively not at all sustainable. Because our business involves the use of raw materials, the manufacture of products, the sale of the product, and the destruction or obsolescence or both of the product.

[01:18:46.650] - INT3

So it's alignment, sincerity, strength, consistency over the long term, and our ability to implement it in the core business. It's going to enable us to deliver this message and to deliver it over the long term and to get people on board over the long term. And it will also enable us to accept that when we see the ultimate goal, it's to have a positive impact. We'll come back to that later. It allows us to integrate this higher purpose without having to go through all the intermediate stages. We're confident that we're going to build something sincere and strong. And even if we can't see exactly how it's going to evolve the business model in the long term, the little touches are concrete and they're very aligned. What's next? Positive impact. I'm afraid that in the long term, this term could be a little destabilizing. In other words, it could be

something that's hard to believe in the long term. As people become more mature and intelligent on the subject, God knows it's on the rise in French society.

Interview 4:

Table 38 reminds you of the general information regarding the interviewee.

Table 38

Extracts of Interview 4

Organization code name	Interviewee code name	Job perimeter	Interview duration	Gender (M/F)	Managerial level	Company seniority (years)
HQ	INT49	Diversity and Inclusion	00:32:56	F	Employee	12

[00:00:02.010] - INT49

A company where everyone feels free to say what they want, to express their ideas and opinions without fear of being discriminated against or put aside. The right to make mistakes, etc. And then a company where everyone feels they have the same opportunities as everyone else, so the same career opportunities, the same, the same right to information, the same rights to training etc. And so. That's really the intention, based on the principle that each person is different from another, totally unique. Obviously, we realize that minorities or social groups who share the same characteristics, are less represented at a certain level. And that's why, somewhere down the line, go and look at this in detail. It's also a way of measuring your level of inclusion in the company. Because if you have few women, few disabled people, few people of color, few extroverts, introverts, few people from such-and-such a background, well, that just goes to show that at some point, somewhere in your company, in your processes, in your culture, in your tools, there are biases.

[00:01:21.310] - INT49

And so for that, we've set two priorities at the global level, which are professional equality and disability. Because these are pretty much the only two elements that we can measure in all the countries we're in. That we can measure, not so much legally, but also in a way that makes sense for everyone.

[00:09:05.500] - INT49

What does it mean to feel valued, you know? What does it mean when my name appears on the best employee of the month list?

[00:09:13.570] - David

Yeah, really

[00:09:15.250] - INT49

Because feeling valued, feeling included, that too can be abstract and different from one person to another.

[00:09:24.790] - David

Yes, definitely.

[00:09:28.090] - INT49

So that's what we're trying to do... to express it in hyper-pragmatic everyday actions.

[00:09:40.340] - David

Yes, no, no, absolutely. In fact, there was another article that came out about researchers who had looked at people who... It's more specific to the strategic process, but it said that the fact of being included and thus integrated into the elements, at a given moment, there was an overload of information, an overload of demand, etc., which caused people to feel that they were being overloaded. So there are people who prefer not to be included in terms of, well, physical or and that what's important to them is if you give them the info of how it happened and why such decisions were made, it suits them and it brings them that feeling of inclusion. They don't need to be there. So there you go, it's just an aside, but there you go.

[00:10:40.180] - INT49

In fact, for me, inclusion, what changes from before and after, is that before we asked a person when he entered a box to integrate and adopt the codes of. Now, it's more a question of how the company adapts to the needs and specificities of the individual. Because we realize that the more they can, and they have the right, we encourage them to be themselves, the more they'll bring all their potential and uniqueness to the table. That's what's going to get the company off the ground. So, yes, it's a lot more complex to manage, to organize, to bring about a compromise, a vision of something. But in the end, it's much more powerful because everyone will have co-constructed it, everyone will feel valued, and so on.

[00:16:58.460] - David

Yeah, totally. And so, the deployment of what is inclusion in the group, etc., is a research stage. Is this a research stage or have you already set up things, training, stuff like that?

[00:17:13.610] - INT49

Yes, we're putting things in place actually. I actually wrote the global strategy. It took a long time because it involved integrating all the countries and I have to admit that it makes this subject, which is already very complex. And so, on the whole inclusion front, we're gradually rolling out concrete tools. We're in the process of designing two e-learning programs for our 158,000 employees, on what is diversity and what is inclusion? Why is it an issue for the company, for the world? Why it's a challenge for everyone. To lay the foundations. And then a second e-learning session on me: who am I in all this? What's my uniqueness? What's my authenticity? What do I bring to the table and why is it important for me to bring what I am? Because that's what makes me different. So those are the two things that will be aimed at everyone.

[00:18:18.240] - INT49

At the same time, we're working on a ... much more intense and advanced training content for all BU DGs and the GLT.

[00:18:30.640] - David

Yes.

[00:18:33.210] - INT49

And then we launched this project to write and co-write 700 inclusive behaviors. We're also launching a small festival to celebrate and highlight all the initiatives that are being done on this side. And we also need to promote how we do it because, basically, the gender diversity indicator—that is, the indicator for men and women, has been included for the first time this year in the remuneration package as an objective in the remuneration of general managers.

Interview 5:

Table 39 reminds you of the general information regarding the interviewee.

Table 39

Extracts of Interview 5

Organization code name	Interviewee code name	Job perimeter	Interview duration	Gender (M/F)	Managerial level	Company seniority (years)
BU1	INT28	Warehouse	00:34:14	M	First-line manager	19

[00:04:49.470] - David

Yeah okay, great. We'll come back to these elements in a few moments, but can you just tell me a little bit about yourself, your experience, your history with the "We Make it Positive" approach, and where do you situate the starting point of all this?

[00:05:06.280] - INT28

So, in fact, it's quite broad, for me it's this approach. It's quite broad because I would obviously put a lot of human beings behind it. We're working on.... In fact, my job is extremely... So for me, the positive side of business is first and foremost the way you manage, the way you get people involved in this item. So, he's extremely operational, extremely close to people. That's how I see it. And in fact, for me, it's extremely... I have an extremely broad vision of the subject. It's uh, it's... When you sent me the invitation, I thought, what do I actually put in it? And it's a bit... I'm not going to say how difficult it is, but in fact you can see that you can put ... At least from my point of view, there's obviously a lot you can put into it.

[00:06:16.690] - David

So, you were saying that the most difficult thing is to encourage employees to follow this approach? So, can you tell me a little about how you go about getting people on board with “We Make it Positive”?

[00:06:36.850] - INT28

In fact, we've had rituals with our teams for a long time. We have teams of 80 people. When you take an autonomous unit today, it's between ... So, depending on the autonomous units and professions, it's between 50 and 80 people. So it's all about the energy you're going to put into the proximity part—that is, how you get your messages across and what support you ... And what organization you put behind it to get these messages across. So we've got different subjects in the warehouse, we've got old teams, so they've got the maturity, the culture of the company. In all these areas, we're talking about a culture of change, an approach to new methods. I'm thinking, for example, of continuous improvement. You're starting now with the five Ss, quick wins and things like that. We've got acculture, we're not top-down in fact.... that's what I mean.

[00:07:58.750] - INT28

We always try to surround ourselves with groups that will bring together warehousemen, managers, and autonomous responsibilities. Thanks to these groups, in fact, if I take the image of tentacles, which through rituals... For example, we have a group we call the CSR group, so we have two of them. We have two groups in the warehouse, and I'm in charge of one of them. One is more concerned with disability issues, for example, and the other is more concerned with what I do, how I can improve my waste sorting, how I can... How can I improve my waste sorting, how can I ... well, you know, improve other things around CSR, for example. So we've got a lot

of people in the field who've raised their hands, which means we haven't named them. So it's through this experience that we've actually built up a foundation.

[00:08:59.920] - INT28

But what are we doing? What are your ideas? So they're also going to solicit other colleagues. So through these tentacles, let's say, in the field, we manage to capture and when you manage to capture, well it's easier to give meaning when you start something. So that's something that works well in our warehouse, where the teams are used to it. So our ... The difficulty we might have is that we're in a stronger hiring process. In other words, how are we going to immediately interest new recruits in all these initiatives that the company is putting in place? We have a lot of tutors, a lot of trainers, a lot of intermediaries, ... whoever they may be. And so it's ... My role is to solicit them, to prick them in fact ... you see ... through very precise moments, through caffeine eh. For example, we have moments like this when we... either the employees come up with topics and when it's a bit more advanced, we come up with our questions ... So when I say "we," I'm referring to my team of managers and I, who come with our questions and then work on three or four topics.

[00:10:21.140] - David

Yeah, so if I understand correctly, every time there's a topic, it's handled collaboratively with different representatives of trades or hierarchical levels.

[00:10:36.470] - INT28

Exactly. Exactly. In fact, it's really part of our continuous improvement approach. You see, it's not just about processes, we say to ourselves that the basis of everything is that... and this was one of the prerequisites of the autonomous unit, that... In fact, the decision doesn't come from

one person or a group of people, it's ... if there's a decision to be made, it's shared and we choose the best one for everyone. So we're in this as much as possible. Because you can't go from... So we've got a long history of working with teams, and that's the way it's always been. But then, you can't go from 50 to 100 years without having stages of autonomy. Otherwise... you always need a framework. So, of course, collaboration is all about... there's a subject to start with. You don't just start off with anything either. So it's something that works well, I repeat, and in fact gives us positive energy to move forward.

[00:11:51.710] - David

So you're the one who set up this system. And I'm kind of wondering... If it's something that works, why isn't it duplicated elsewhere?

[00:12:06.500] - INT28

Yeah, so it's duplicated elsewhere. So in fact, that's... In fact, we're a bit ahead of the game because we were the first to get started. And what I'm telling you today, it's started... Well, more or less strongly, and I'm on the transverse side of my mission. That's why I talk about it like that too. The others, my other colleagues with autonomous responsibilities, are on other subjects, but for me, it's these subjects, and since we started out on them, I'm obviously interested in continuing them.

[00:12:48.110] - David

But that's something that's only planned for the warehouses. It's also a way of working that can be duplicated at store level and so on.

[00:12:57.960] - INT28

Well, I used to work ... I'm going to tell you about myself, about how I used to work in the store. That's how I used to work when I was warehouse manager, when there was a subject to share with the teams at meetings, I would say "and in the end, what do we do? Of course, you're never 100% sure you're going to do it. But in any case, the solution chosen by the majority was the one that got everyone on board in the end. So in the store, I've worked a lot like that, in a ... how shall I put it? Of policy, of change when I arrived in Béthune, we were at the beginning of the two-hour withdrawal. We were ... the portability of the equipment had trouble getting off the ground. In the end, we ... you look out loud and say why don't we go what?

[00:13:47.970] - David

Yeah.

[00:13:48.750] - INT28

And there you have your answers. And there are inevitably collaborators who are more or less, let's say, acceptable or justifiable. And then, by taking apart a few arguments, there you are ... Oh yeah, okay, let's go ahead and test. And if the test isn't conclusive, we say to ourselves, well, we're able to draw conclusions with... Having used a material or a solution. So I've worked a lot like that. It's in my way of doing things, of applying to the decision... And in fact... I take a lot of examples from team sports, in the team I have today. In fact, when you've got results or when you've got... how can I put it... In the best teams, when a team is good, it's not just the players, it's not just the coach, it's not just the technical staff, it's everyone. It's not just the coach, it's the technical staff, it's everyone. It's even a good physiotherapist who keeps the team in shape.

[00:14:54.930] - INT28

So, I've been saying for years to the collective that I've got that a victory has to be shared and a defeat too. So to come back to the store, I think it's completely duplicable, but I think it's above all a question of personality and posture. I think that's it, because when you're in that frame of mind, there's no reason why it can't work. But I think what's really important for me is that, to get into this kind of approach, you need to have the confidence of the team. At least from the people around you, if you want to spread the word. And to have trust, you generally need stability or seniority, you know, in a mission, which gives you enough credibility to say that... You know, to have an aura and therefore to start out on something... To say if we go for it, it's going to work and get on board...

[00:16:15.660] - INT28

Actually, what I mean is... Tomorrow, if you go to war, the guys will follow. And I think that... The power of intention is extraordinary if you have a minimum of recognition. And what could be a stumbling block in a store is perhaps the stability you can get in certain positions. But I'm thinking of the logistics population where, unfortunately, there's a lot of turnover in the logistics manager part. And that's still true, and was true when I was there. As a result, you find it hard to... you know, to say... To actually measure the fruits of what you've contributed, and to show your teams that when you're all in it together, or when you're on the impact side... well, it takes time to measure an impact... It's complicated.

[00:17:05.100] - David

So for you, this collaborative way of working works well when you have a reference person who is a catalyst for the approach, who has strong values, let's say, and who knows how to embody them. Is that what you mean?

[00:17:21.780] - INT28

Yes.

[00:17:23.340] - David

And that brings me back to a question I didn't ask at the very beginning, but what was the reason you came to Business Unit?

[00:17:35.060] - INT28

Ah so it's... back in the day... When I say back then, I feel like I sound like an old-timer... There was a lot less brand marketing than there is today. But I don't have to draw you a picture, social networks are a given for some people. I can assure you that back then, there was nothing. The ad I found was in a local paper. And it was the only medium where you could find work. You know what I mean? I was on the job. So on Sunday mornings, while eating my bread roll, I'd look at the ads in La Voix du Nord. And what drew me to Business Unit was that in my previous job, I'd done quite a few things, quite a few things, and the person I was working directly with ... In fact, I'm... I can go to war depending on the person in front of me. And if I don't have that contact, it's not that I'm not invested, but it's more complicated.

[00:18:51.010] - INT28

And what drew me to Business Unit was that I'm already a big DIY enthusiast, so a DIY store is going to appeal to me. In any case, what we're going to do there is going to appeal to me, and I was hooked by what was in the ad. There was something in the text where there was a word that stood out "cohesion," you know, through different words. So I thought, why not? I had absolutely no problem with my previous post, absolutely not, but I thought, well, this could be a good opportunity. And the people I met during the recruitment process, each time I came out saying to myself, there was a stamp where I actually validated. Every time, the people I met made me want to do it, especially my warehouse manager at the time. What really made me decide to come to Business Unit France was the guy in front of me. Not because of what he was selling me, but because of who he was, introducing himself and explaining his background. I said to myself, this is a guy I'd like to work with and often ... well, I don't change jobs and I haven't changed in 19 years.

[00:20:06.970] - INT28

But in any case, on average the bosses I have last two years and for me it's really important the relationship I have with my boss. So that's what keeps me coming and probably keeps me at Business Unit. It's because I'm dealing with people who are able to interest me. When I say interested, it's not for personal gain but for the added value of the work and the relationship you have, the trust and all that, you see.

[00:20:38.410] - David

So we're back to this idea of aura you mentioned earlier?

[00:20:45.340] - INT28

Yes, you need credibility. Not necessarily on technical values, but on human values. But if we're talking about cohesion, if we're talking about solidarity and I feel that it's just a speech and that it's not values that ... well, with experience, you get a sense of whether it's a nice speech to flourish the thing or whether the guy is made of it. And that's something I'm emphasizing more and more with experience. The value of the person I'm dealing with rather than the technical side. Because I always say to myself that values are something intrinsic to you. More or less. And so, with experience, with... So I often say life experience too, because it's not just the job that forges you, brings it out in you. The technical side ... we've all started a job, and that's something you acquire with experience.

[00:21:46.690] - INT28

And I'm convinced that values grow with experience. But you've already got them, you've already got them. So when I'm not faced with human values, even when recruiting, I'm quite sensitive to that. A warehouseman who comes in with no experience, who may be stuffy, a plasterer, whatever, but if I feel that the guy in front of me wants to work, that he has values, you know, to be part of the team, I have no problem with that.

[00:22:12.910] - David

Yeah, no, I see. It works. And does it ... Because we were saying that the "we make it positive" approach is quite broad and so on. Could the useful workshops be a point of reference? Or had you already been involved in the process before these workshops?

[00:22:34.670] - INT28

Uh no, no, not at all at all at all. I haven't... I mean, I'll look, you know, when there are posts there. As I have quite a few communities, I have to admit that sometimes the news is hard to keep up with, and you quickly get caught up in the operational side of things. So that's what I was telling you, that's why it's vast and I think I'll have to go a bit further to get a bit more detail on the steps involved.

[00:23:11.550] - David

So, overall, how would you define it? What was the objective of We Make It Positive for you?

[00:23:21.540] - INT28

Ah well, for me in fact, this approach, I take it as... How can I explain it in a synthetic sentence? How do you bring people together through positive thinking? I don't know if I'm clear enough on that.

[00:23:56.130] - David

Yes, yes, I can understand what you mean by that.

[00:24:02.530] - INT28

I don't know how else to put it.

[00:24:08.340] - David

It's an element that brings people together. Is that what you mean?

[00:24:16.410] - INT28

Exactly. Exactly.

[00:24:21.780] - David

On the whole, would you say that ... So often, when I ask the question, you'll tell me if at Business Unit France, it's a little different, but basically, by HomeCo, 24 commitments had been made. So I think that at BUSINESS UNIT FRANCE, we concentrated on five major commitments, more than the 24. But on the whole, would you say that there are things that are inconsistent, things that are lacking or perhaps too far removed from the field? I think that at the start of our conversation you mentioned that you were also involved in writing the roadmap for sorting and waste, etc. So, overall, would you say that there are things that are inconsistent, things that are missing or that are perhaps too far removed from the field? So does the overall strategy make sense to you? Or are there things missing or inconsistencies?

[00:25:13.950] - INT28

No I wouldn't say inconsistencies, because I think everyone finds, ... You know, you always find something to... something to hold on to. Often the difficulty we can have when we have approaches like that at HomeCo or Business Unit France, is with the warehouses. I'm thinking in particular of, you know, if I take a very concrete example, the LAKAA, we were not very concerned about the subject. Well, when I say not very concerned, obviously there were some sticking points, and we said to ourselves, if we really want to challenge ourselves, well, we won't be able to. We'll be at the back of the peleton. Right now we're 70€ out of 150, so we're in the middle of the table. There are lots of things we can't do and yet in our approach we always manage to find a few anchor points to get the ball rolling. So inconsistent, no? I can't think of a single thing that's missing, and in any case, we always manage to hold on to things... I'm thinking... no, no, no.

[00:26:30.000] - David

So now, if I've understood correctly, you're working with other people on the fact that you can add actions in LAKAA so that it's more in line with what you can do in the warehouse on these subjects? Is that it?

[00:26:45.480] - INT28

Yes, that's right. Yes, there's more like two of us and a manager. We needed someone to talk to when we started up. So now we're working on it and we're challenging ourselves, particularly with the Valence warehouse. And then we registered quite a lot of ... so at the beginning, we had gone through with the LAKAA teams ... we had written quite a lot of actions that could fit in. We obviously had some in common with the stores. We added a few more, and since then we've added a few more, because in the end, at the start we hadn't even thought of that. And we're challenging ourselves enormously with Valence, because we're challenging each other for first and second place, because I think there are five warehouses signed up to the scheme, and it's great because there's real emulation on the subject in this respect.

[00:27:46.110] - David

And how do you go about adding something to LAKAA? Because I guess you can't put whatever you want on LAKAA either.

[00:27:55.050] - INT28

In fact, you have a little "add an action" box. You explain what your action is, and then the validation committee tells you it's an action that can be included.

[00:28:09.620] - David

Ok

[00:28:10.190] - INT28

And they give you a number of points, which can go from 5 points to 100 points. And then it's registered as a possible action and the other colleagues who do it, they also get these points.

[00:28:25.610] - David

It works. Okay. Just because I think you have to leave at 2 pm, right?

[00:28:33.320] - INT28

Yeah, right. Yeah, but don't worry.

[00:28:35.150] - David

Okay. I just have another question. Would you say that the "We make it positive approach" was collaborative or not?

[00:28:46.280] - INT28

Well, at least in terms of how we tried to bring it to life. Yes, we did. Did you ... I explained it to you. Every time we do something like this, we try to find relays. We've done it on training courses, for example, feedback, or things like that.

[00:29:02.650] - David

Yeah, so on the implementation part. Yeah, okay.

[00:29:07.910] - INT28

So, yes, absolutely collaborative.

[00:29:11.300] - David

So, do you have any more information about how it was built before we presented it to you or not at all?

[00:29:20.990] - INT28

No, I don't.

[00:29:23.510] - David

And on the whole, isn't it embarrassing for you to have something that... I don't want to say that just falls into your lap, but that comes out of nowhere and then you appropriate it, deploy it etc.?

[00:29:41.270] - INT28

Uh no no because ... That's what I always say, I always trust the people who work on it. So today there's enough intelligence in how ... in setting up groups, when you come up with a tool or an approach, to go and find a lot of partners, in fact. It's multiple. This was perhaps less true before, when there were far fewer things that were top-down, no doubt. Because there are a lot of projects, there are a lot of steps. But now, I know that we're often asked about warehouses, about all sorts of things. We've done a lot of work on employer branding, with videos that we've posted on LinkedIn. I was lucky enough to be able to explain my job, and I loved it. I think it's extraordinary! And there aren't many companies that do that, so it's great. And so that's it, if it hadn't been me, because sometimes one of my colleagues has replaced me for a few video sequences on another theme. I'm fine with that. So I don't mind having things go downhill,

frankly. After that, it's like I say, there are points that are covered, and sometimes you say "Well yeah, maybe that was forgotten." But in fact today there are so many communities that you can give your opinion and say why we didn't think of that, you know? That's what's so great about it.

[00:31:14.160] - David

Yes, on the whole, everything is always very open. And then we welcome people's inputs and then we look at what we do with them, and so on.

[00:31:25.910] - INT28

Yeah

[00:31:28.400] - David

okay, great. Well listen, I've gone through the big questions I wanted to ask you. Is there just maybe something you'd like to add that we haven't talked about, but you think it's important that we raise it together?

[00:31:42.050] - INT28

No, I don't. I hope I've been useful. At least from my window it's so wide that it's like this. So I hope that my testimony can... well, not help you, but that it's useful, so to speak. I like the way things are, you know, happening. I see a lot of future, you know, around all this. I mean, I've been with the company for 19 years, but it's not a company in decline. Things happen all the time. And then, when certain things happen and you see that it doesn't work out, you don't get stubborn. But there have already been ephemeral projects because the return wasn't really useful.

And I remember the first interviews I had, and I'll end on that note, were all about saying we'll never hold it against you to dare, even if you're wrong, but above all, dare.

[00:32:51.380] - INT28

So in this type of approach, well, sometimes we dare, sometimes we fumble, but today we've managed to rectify things. And we say to ourselves, "maybe we'll change that." And that's the main thing. And I find that, in fact, we're still...Yes, it's downhill. But we're lucky, and that's what I always say to the teams, let's keep this chance to...The company gives us tools and directions, and then you adapt them to your territory and to what you know how to do. And that's a real asset.

[00:33:20.160] - David

It's this idea of undertaking within the framework of what?

[00:33:23.940] - INT28

Exactly.