



# Strategizing from the middle in radical change situations

## Transforming roles to enable strategic creativity

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### Abstract

**Purpose** – Research has recognized the importance of middle management in the strategy process. Nonetheless, two questions raised by the involvement of middle management remain largely unexplored; they are central to this study. The first question concerns the conditions of this involvement. Before the 1970s, middle managers were subjected to operational processes. During the 1980s and 1990s they often embodied bureaucratic unwieldiness. How, then, has an actor in an organization migrated from a position excluded from the strategy process to a key position in this process? The second question concerns the functioning of the strategy process itself: what are the conditions of strategic creativity in this type of expanded process? This paper aims to address these issues.

**Design/methodology/approach** – The approach taken is that of a longitudinal case study.

**Findings** – On the basis of a seven-year longitudinal case study of strategy practices in a firm facing radical change, this article pinpoints two research results. The first result shows that becoming a strategist is not the simple result of training in strategy techniques. Involvement in the strategy process goes beyond the cognitive dimension; it entails the construction of new systems of roles and identities, along with development of appropriate dialogue modes. The second result is more interesting, and was largely unpredicted. The observations indicate that to achieve the necessary strategic creativity, the strategizing process itself must be transformed. If strategy is envisioned as an emerging social reality made up of strong situations and interactions between strategists, in a dynamic context structured by role systems, spatial and temporal conditions and discourse, developing a new strategy necessitates transformation of its social fabric.

**Practical implications** – Understanding the microprocesses at play in the inclusion of middle managers in the strategy process is important to help companies better conceive and apply their policy of including middle managers in the strategy process. This entails the definition of activity content and new skills required, along with career and loyalty building, and of the forms of organization in which middle managers evolve and develop. In this sense, the approach we proposed can be practical for companies and their stakeholders facing these challenges.

**Originality/value** – The longitudinal and very detailed case study over a long period of middle managers doing strategy during a radical change situation.

**Keywords** Middle management, Change management, Management strategy

**Paper type** Research paper

In a context of incessant movement, strategizing must be reexamined to capture and interpret the weak signals and accelerate decision making and implementations



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(Eisenhardt, 1989b; Van de Ven, 1992; *Strategic Management Journal* (1992), two Special Issues on strategy process research; Szulanski *et al.*, 2005). The efficacy of the classic strategic summit has been called into question (Mintzberg and Waters, 1985; Mintzberg, 1990, 1991) and the development of a strategy process that can respond to this issue has been brought to the top of the organizational agenda. Research has thus recognized the importance of middle management in the strategy process (Westley, 1990; Floyd and Wooldridge, 1992, 1996, 2000; Dutton and Ashford, 1993; Samra-Fredericks, 2003; Balogun and Johnson, 2004; Golsorkhi, 2006; Johnson *et al.*, 2007). Nonetheless, two questions raised by the involvement of middle management remain largely unexplored; they are central to this study. The first question concerns the conditions of this involvement. Before the 1970s, middle managers were subjected to operational processes. During the 1980s and 1990s they often embodied bureaucratic unwieldiness. How, then, has an actor in an organization migrated from a position excluded from the strategy process to a key position in this process? The second question concerns the functioning of the strategy process itself: what are the conditions of strategic creativity in this type of expanded process?

On the basis of a seven-year longitudinal case study of strategy practices in a firm facing radical change, this article pinpoints two research results. The first result shows that becoming a strategist is not the simple result of training in strategy techniques. Involvement in the strategy process goes beyond the cognitive dimension; it entails the construction of new systems of roles and identities, along with development of appropriate dialogue modes. The second result is more interesting, and was largely unpredicted. Our observations indicate that to achieve the necessary strategic creativity, the strategizing process itself must be transformed. If strategy is envisioned as an emerging social reality made up of strong situations and interactions between strategists, in a dynamic context structured by role systems, spatial and temporal conditions and discourse, developing a new strategy necessitates transformation of its social fabric.

To develop our line of argument, we proceed in two parts. The first part of this article focuses on the methodological issues of our research. In light of our research questions, we addressed the following challenge: how can we develop intimacy with people doing strategy within a situated strategy process over a significant period of time? Our response was to use an action research approach. Despite its being recognized as an acceptable methodology, the scientific community is not comfortable with action research. This is mainly because the methodological balance is perceived to be more on the action side than on the research side (i.e. the production of new knowledge). In the first part of this paper, we introduce and illustrate the methodological principles we use as guidelines for our action research approach. The second part of this article presents our data through several levels of analysis and discusses our research findings.

### **1. Designing a longitudinal case study of strategy practices using action research**

Our research approach responds to two challenges. First and foremost is the challenge of conducting a longitudinal study of strategy practices with the aim of going beyond the sequential and top-down conception of strategic action (Whittington, 2007). Far from being sequential and limited to top management and experts in strategy, this action encompasses multiple periods of time, multiple actors and multiple contexts

(Pettigrew, 1992; Burgelman, 1994; Hitt *et al.*, 2001; Tucker, 2001; Hendry and Seidl, 2003; Voelpel *et al.*, 2004; Pina e Cunha *et al.*, 2006). A longitudinal study must accommodate this manifold reality and attempt to portray it and make sense of it. The second challenge is to analyze in depth a complex set of interactions between actors whose roles are undergoing transformation (Albert *et al.*, 2000) and who, as they strategize, are also constructing themselves as strategy actors. Such an analysis requires close proximity to the actors in question. Yet, it also presupposes that the researcher not be locked into the circles of small groups and that he maintain his distance in order to grasp both the broad nature of the strategy process in the company as a whole and the abductive dynamic of the microprocesses of strategic learning.

To meet these two challenges, we grounded our research design in three methodological principles – each spotlighting a key notion. The first principle is based on the notion of a strategic situation. In our view, this notion is the basic element of modeling and the unit of analysis to understand the strategy dynamic in environments with multiple actors, multiple time periods and multiple contexts. The second principle stems from our approach to strategic action, what constitutes this action and what it relates to: strategic dialogue. This notion of strategic dialogue bolsters the classical representation of the strategy activity of middle management (Floyd and Wooldridge, 1992) by analyzing the practices of dialogue in specific situations. Our third principle is based on the notion of interaction. It starts from the assumption that strategic dialogue is made up of a wide variety of interactions, most of which are unforeseeable and can only be observed by the researcher if he is open to and in close proximity with specific actors in specific situations. This principle led us to adopt an action research approach that we then had to refine in order to endow it with a longitudinal dimension (Susman and Evered, 1978; Eden and Huxham, 1996; Evens and Handelman, 2006).

Finally, what also confers on our approach the characteristics of action research is the fact that we integrate the actors in the research process. Certain levels of data processing and of formalizing findings into actionable knowledge were carried out in collaboration with the actors, as we show below.

The case study on which this paper is based is a French company in the telecommunications sector that we will refer to as TELCOM. This company has transformed itself radically over the period from 1996 to 2002. It has been privatized, has opened up to competition, has doubled its turnover, has expanded internationally (with 60 percent of turnover and 40 percent of employees outside France) and has changed its business model dramatically to capture new markets created by the convergence of fixed-line, mobile and internet technologies. To design and implement this strategy, middle management was purposefully included in the strategy process whereas it had previously been mostly excluded from such processes. From an organizational standpoint, this means that the strategy dynamic now results from the interaction between the company's global level (i.e. from corporate head office) and the various local levels of strategic action (i.e. operational units (OU), regional and divisional head offices). How can we model the diversity, the heterogeneity and the effectiveness of this new strategy process overall while at the same time highlighting middle management's strategy practices?

### *1.1 The inclusion of middle management into the strategy dialogue*

The approach we adopt in our research takes us away from a sequential and specialized conception based on hierarchical levels towards a conception capable

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of capturing the moments when strategy is devised based on the categories of the actors involved in these moments. The notion of the strategic situation contributes to our analysis of these moments. This notion goes beyond the classic notion of process and pinpoints the subjective dimensions (the sense that is constructed, the intention that takes shape) and the objective dimensions (procedures, places, meetings, objects, plans, projects, etc.) of action. We may then consider the embedding of strategizing and the transformation of the actors that take part in it. We can also integrate in a single approach both foreseeable and highly ritualized moments – such as executive committee meetings and strategic seminars – and fleeting and random moments that are difficult to foresee based on the formal agenda.

This notion of situation is widely used in the social sciences (Goffman, 1964; Garfinkel, 1967; Garfinkel and Sacks, 1970). It finds its roots in the pragmatist approaches (Dewey, 1933) that emphasize the indetermination of situated action and the importance given to the emergence and construction of social objects in the course of interactions that make up the situation. The notion of situation resonates strongly with the works of Schön (1983), for whom “conversation with the situation” enables actors to create knowledge regarding action. It also resonates with the work of Weick with respect to sensemaking that gives primacy to action over cognition through the process of enactment (Weick, 1995), as well as with other more recent works (Elsbach *et al.*, 2005).

Bringing these works into convergence, we define this notion of strategic situation by placing emphasis on the group of actors that the situation puts into interaction, both with one another and with their environment, on collective action and the agenda that unites them, and on the fact that an outcome is expected (i.e. an effective strategic action). In the specific case study of our research, we particularly emphasize the links that must be established between the situation and the context in which it occurs, as well as with the required outcome which both constrains the actors and opens up a specific path of exploration (March, 1991).

Such a situation of exploration takes on its full meaning in the context of a company that is redefining its strategy and, to achieve this, is reviewing the process for developing this strategy by changing the rules of the game and including new actors in the process – namely, middle managers. In the study presented in this article, the strategy practices of TELCOM observed over the course of seven years have been split into three episodes (Hendry and Seidl, 2003) (see Table III for a description of the content of these three episodes).

Within this strategy process, the second episode (1999-2000) marked a particularly significant shift. Local actors found themselves confronted for the first time with the need to translate their strategic aims (i.e. the result of the first strategic episode that was viewed as being “too verbal,” “too much wishful thinking” and not sufficiently quantified) into strategic actions. It is the study of several situations during this second episode (Table IV) that we focus on.

### *1.2 Looking at the strategy fabric: a dialogical perspective*

Our dialogical approach to strategy practices starts with the idea that changing and being changed arises from the judicious use of words. Since Aristotle (1965) and his *Rhetorics* (trans. Jean Voilquin), this idea has been the basis for a number of streams of thought (Bohm, 1996). Furthermore, we increasingly find this idea in research in various forms, such as discourse analysis (Fairclough, 1992; Van Dijk, 1997),

storytelling (Boje, 1991, 1995; Czarniawska, 2004) and conversations (Ford and Ford, 1995; Liedtka and Rosenblum, 1996; Quinn, 1996; Van der Heyden, 1996; Samra-Fredericks, 2003; Hardy *et al.*, 2005). Yet, these approaches leave us unsatisfied because, in our view, strategic dialogue takes place in an organized *milieu* and therefore has a strongly artifactual dimension. As a result, it can be neither reduced to a simple cognitive exercise or language game nor modeled using the metaphor of inter-individual conversation. Organizing devices (Isaacs, 1993; Zietsma *et al.*, 2002) are an essential modality of strategic dialogue. Therefore, dialogue cannot be separated from its organizing devices. Moreover, our interest in strategic dialogue lies in the fact that time constitutes a key dimension in the fabrication of strategy. It is for this reason that we have delimited the episodes (Van de Ven, 1992; Hendry and Seidl, 2003), highlighting the swings (Pina e Cunha *et al.*, 2006) that punctuate this fabrication (Pettigrew, 1992) and keeping in mind that these time-based divisions are also moments of transformation for the actors.

Using the actors' dialogues as a starting point for observing strategy practices compels us to comply with the systemic principle of non-separation of "content", "container" and "process." In this perspective, we observed in depth what managers discuss in situations of exploration: how they organize their exchanges; on what they base their arguments and what tangible outcomes they set out to achieve. As a guideline for our analysis of the dialogues retained, we developed the following reading grid (Table I).

Starting from strategic dialogues takes us back to notions of sensemaking and sensegiving (Smircich and Morgan, 1982; Gioia and Chittipeddi, 1991; Weick, 1995). However, observation of these dialogues draws out the microprocesses through which managers change their interpretation frameworks; this is something empirical research into managerial sensemaking does not really do (Maitlis, 2005; Lüscher and Lewis, 2008). Undoubtedly, this is due to the analytical separation of content, container and process, a predominant feature of such research, as much as it is due to the difficulties encountered by the researchers in observing such microprocesses. Lüscher and Lewis (2008)

Dimensions of analysis	Content of analysis
The core argument	The central theme that focuses strategic discourses at all levels of the organization and structures the interactions between the local and global levels of the organization. This central theme draws two inextricably tied issues into debate. The first issue relates to the content of a new value proposal; the second relates to the actors likely to be included in the strategy of developing this new value proposal
Structure of dialogue	The configurations of actors involved in the strategy process at a given moment in time, and the modality of their inclusion in this process, notably the organizational structures and the rules of interaction
Objects of dialogue	Learning tools and platforms The outcomes and/or media of strategic dialogue
Dialogical interactions	The places, the composition of groups in situations of strategic dialogue, the frequency and the agendas of meetings, time periods, episodes, events and conflicts that pace the process of dialogue. The modes of dialogue and the way in which they are deployed over time and in dialogical space

**Table I.**  
Reading grid of practices  
of strategic dialogue

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define these microprocesses as “sparring sessions” and as “review sessions” in which collective confrontation regarding dilemmas and paradoxes opens up to reflexive interrogation (Lüsher and Lewis, 2008, p. 227). They also underline that the global dynamic of these processes of deframing-reframing should be seen not only at the level of local groups – directly mobilized in the work of interpreting paradoxes – but also at the global level of the company, where paradoxes and dilemmas take on their full meaning. Our research leads us to the same conclusions. Accessing these microprocesses presupposes emphasis on closeness to actors that only an approach of the action research type can establish.

### *1.3 Creating intimacy with acting actors embedded in dynamic strategizing practices*

How can we perceive the diversity and complexity of these microprocesses of exploration, nourished as they are by debate and reflexive action, in situations of strategic dialogue? How can we perceive the numerous interactions, the moments of acceleration and of crystallization of collective representations, the parting of ways, the stalemates and the crises? We wish to emphasize here the principle of closeness to the actors, which is at the heart of action research. With such closeness to the actors, the researcher is solicited to bring his research procedure in line by contributing directly to the process of reflection of the actors in a situation of exploration. Carrying out action research is always associated with the existence of strong interactions with actors and the concomitance of a process of producing actionable knowledge that ties researcher and practitioners together (Reason and Bradbury, 2001). Yet, in reality, the situations that are most often scrutinized coincide with the search for organizational solutions to problems that arise from the operating process and adopt the methods of organizational development (Woodman, 1989). By emphasizing the strategy interactions both between the actors themselves and between researchers and practitioners, our research approach here stems from a slightly different logic from traditional action research and, as a result, enriches the import of action research as a method of producing knowledge on the strategy process.

The strategy process does rely on a very complex set of interactions between different levels and configurations of actors, with researchers being included among the actors in the strategy process. Furthermore, these interactions occur in different modes: interactions within groups and interactions between individuals.

Interactions within groups may take the form of seminars and meetings. They also occur during regular meetings of decision-making bodies (for instance, the executive committee). These interactions may also be inter-individual. They may relate to managers among themselves, whether between a superior and a subordinate in the reporting line or between equals. They may also relate to a specific manager and a researcher. In this case, these interactions take the form of what traditional methods refer to as an interview. This interview may be conducted face-to-face or by telephone, using more or less formalized interview guidelines, and takes place within a set of interviews (a sample) to facilitate comparison of the elements gathered (viewpoints and proposals developed within the framework of the interaction, data and information). For this research, we carried out more than three hundred semi-directive face-to-face interviews (Table II). However, the number is not the most significant factor here. Instead, it is the series of interviews, of observations and of work sessions that are of greater importance. We had the opportunity to conduct several interviews with the same



Reflexive levels of interaction	1997-1998	1999-2000	2001-2002
Interactions with local actors	<i>Individual interactions</i> Two annual interview campaigns: 2 h per interview, 50 interviews. Two campaigns = 200 h	<i>Group interactions</i> Participation in three strategic platforms: 80 d <i>Individual interactions</i> 35 interviews (2 h) with actors on the platforms two times = 140 h	<i>Individual interactions</i> One interview campaign (2 h) with divisional management teams, 30 interviews = 60 h
Interactions with global actors (corporate)	<i>Group interactions</i> With the group charged with carrying out the strategic transformation = 30 d <i>Individual interactions</i> Interviews of TMT members, interactions through emails and phone calls and, above all, many informal conversations during traveling times, lunches and dinners = 6 d	<i>Group interactions</i> With the group charged with carrying out the strategic transformation = 32 d <i>Individual interactions</i> Interviews of TMT members, interactions through emails and phone calls and, above all, many informal conversations during traveling times, lunches and dinners = 4 d	<i>Group interactions</i> With the group charged with carrying out the strategic transformation = 36 d <i>Individual interactions</i> Interviews of TMT members, interactions through emails and phone calls and, above all, many informal conversations during traveling times, lunches and dinners = 6 d
Interactions between global and local actors	<i>Group interactions</i> Global conferences and seminars, meetings = 6 d	<i>Group interactions</i> Global conferences and seminars, meetings = 9 d	<i>Group interactions</i> Global conferences and seminars, meetings = 7 d

**Notes:** d, equivalent number of working “days”; h, equivalent number of hours spent on individual interviews

**Table II.**  
Reflexive interactions within the research process

actors at different moments in the strategy process. We were able to observe them in situations (including a body aware dimension (Minocha and Stonehouse, 2007)) and to let them express themselves with regard to their actions and their achievements.

Interactions between individuals also take on other forms that research less frequently identifies but which may heavily impact both the research itself and the dynamic of strategic dialogue that it examines. These interactions occur at numerous junctures: for instance, making telephone calls and sending e-mails, exchanging memoranda and notes, etc. They relate to exchanges between researchers and managers as well as between researchers themselves, especially when they prepare or “debrief”. These interactions also happen in timeframes other than those of meetings and seminars, and sometimes in places other than those in which meetings and seminars take place: in places for lunching and dining, for instance.

For various reasons (opportunity, level of complicity, availability, and confidentiality in particular), only a part of these interactions within groups and between individuals can be accessed by the researcher and can enrich the research process. In Table II, we draw up a summary statement of the TELCOM case study. It is difficult to count the full set of existing interactions in an exhaustive manner. However, researchers can make an overall assessment of the proportion of interactions known to them that they actually examine compared with the set of all the interactions that actually occur.

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In this respect, the high number of interactions taken into account in our research provides the necessary methodological guarantees.

The research process we carried out was translated by a succession of microprocesses of interpreting and constructing intermediate research findings. Thus, the summary tables (Table II) and diagrams were developed over time as and when interactions with the managers involved in the strategy process took place. Both the argumentations – here, the discursive content and vocabulary used – that are so important when the task at hand is to formulate strategic aims and the actions designed to translate these aims within the organization were jointly agreed upon by the actors and the researchers. This was all the more necessary because the actors, with the help of the researchers, then had to put them into form in order to use them subsequently in the strategic dialogue. As a result, these reformulations represent an extensive series of stages in the construction of a common strategic knowledge.

## 2. The macro and micro dynamics of the strategy dialogue

How can we characterize the forms taken by a strategy dialogue made up of interactions occurring at different levels in a company over a period of seven years? Answering this question requires to take into account the macro-micro dynamic of strategic action, the periods of time and the organizing acts that characterize it, while also maintaining close proximity with the actors to delve into their interactions.

In the first section, we present the dynamic of the whole research process and the levels of analysis through which we progressed to characterize the strategy practices gradually. In the following two sections, we present and discuss our findings; first, with the notion of strategizing controversy, then with the notions of strategizing situation and platform.

*2.1 Studying strategy practices: research process, data collection and levels of analysis*  
*Seven years of partnership with TELCOM.* Over seven years, we conducted several research projects with TELCOM. As in any partnership it took some time to build up the necessary trust for the company to intimately disclose its strategic initiatives:

- 1995-1996 – assessing various strategic change initiatives.
- 1997-1998 – developing strategy practices at the OU level.
- 1999-2000 – developing strategy practices at the regional level.
- 2001-2002 – developing strategy practices at the global level.

During this period, we were involved in several study campaigns. On two occasions, we conducted wide-ranging inquiries within sample groups representative of managers in regional head offices and OU (each time, with ten out of the forty regions and with approximately 40 OU) focusing on managers assigned to establishing the strategy of their entity. For each of these inquiries, we conducted a hundred semi-directive interviews. The first level of analysis of these data and the restitutions sent to the top management team (TMT) led to drafting an initial factual and chronological description of strategy practices as well as to a typology (Eisenhardt and Bourgeois, 1988). Writing up these findings and the ensuing discussions – with both the TMT and the managers who made up the sample – resulted in another level of analysis to characterize further strategy practices.



This joint development then resulted in a representation with three key periods, as summarized in Table III.

This phase of research made significant contributions so that, in 1999, TELCOM's executive committee launched a new phase of strategy development (period 2, value measurement, Table III). Each team heading a region[1] then had to draft its three-year business plan. A total of 40 regional teams were implicated in this new strategic exercise and around 3,600 middle managers were mobilized. It was jointly decided that we would be involved on a local basis in a more intensive application of action research, moving closer to the actors and into the heart of the micro-processes of strategy dialogue. The top management of several regions were contacted and encountered. Initial exploratory interviews were carried out with regional directors. Finally, in three regions, we observed strategic practices from the inside. These three regions have comparable economic performances and staff sizes. They are within the mean for TELCOM regions.

Observations simultaneously carried out in these applications of action research and during the interactions they entailed led to another level of inquiry and data analysis (Yin, 2003). In each of these local cases, the request from the team in charge of applying the decisions of the executive committee with respect to the strategic contribution of local managers was the same. So too was the action research protocol

	Value awareness (1997-1998) developing strategy practices at the unit level	Value measurement (1999-2000) developing strategy practices at the regional level	Value globalization (2001-2002) developing strategy practices at the global level
Core arguments	<i>Label:</i> local strategy <i>Main argument:</i> customer needs <i>Initial slogan:</i> listen to the customer <i>Ultimate discourse:</i> customer differentiation, cost management, job redesigns and employment	<i>Label:</i> business plan <i>Main arguments:</i> operational earnings, fierce competition <i>Initial slogans:</i> differentiate customers, gross and operating margins <i>Ultimate discourse:</i> scenarios, business partnerships, business models (internet)	<i>Label:</i> synergy <i>Main arguments:</i> cooperation, business models synergies. <i>Initial slogans:</i> one company, differentiate and globalize markets, share resources, local/global operational earnings
Structures of dialogue	<i>Key actors:</i> managerial teams for the 500 OU, split into 50 regions <i>Key mechanism:</i> each OU devises and presents its own local strategy	<i>Key actors:</i> OU and regional directors. 200 OU affected, grouped into 40 regions <sup>a</sup> <i>Key mechanism:</i> each OU drafts a business plan under the aegis of a regional director, and defends the plan at the corporate level	<i>Key actors:</i> divisions, OU and regional directors ca. 12 divisions affected <i>Key mechanism:</i> each division designs its own strategic plan and compares it with the others
Objects of dialogue	The formulation "in literary terms" of a strategic intent framed by a template recommended by corporate	Regional business plans (based on a template recommended by corporate), regional P&Ls, investment directive to reconnect the technical view and the marketing view	Division strategic plans, process mapping to re-engineer interactions and synergies, a new brand name to foster company integration

**Table III.**  
Periods of the value controversy 1997-2002

**Note:** <sup>a</sup>Operational units and regions merged over the course of this period

the researchers proposed to the local actors; nonetheless, these actors remained in control of the organizing and scheduling of their strategic action. At the end of this phase of research, we were able to characterize three different paths taken by local actors, as presented in Table IV.

In line with our action research approach, we discussed these differences with our research partners – both with the TMT at corporate head office and with regional management teams – and deepened our analyses to characterize progressively these cases in terms of strategic situations and to define their discriminating factors (Eisenhardt, 1989a).

*Data collection.* A total of 3,600 TELCOM middle managers were involved in the new strategy process.

	Situation 1	Situation 2	Situation 3
Time of dialogue	After the launch meeting by the RMC, a single two-day meeting will be held	A cycle of three two-day meetings ends without leading to a tangible strategy outcome	A process begins that will last almost a year and will lead to the attainment of strategic actions and a business plan presented to the executive committee
Organization of dialogue	The RMC establishes itself as the strategy team in charge of conducting the exercise required	The RMC decides to make itself the strategy team by deputizing, for these meetings, representatives of the OU	The first decision of the RMC is to select a specific team; the business plan platform includes actors from outside the region (Table V)
Managers involved	The 12 middle managers making up the RMC, headed by the regional director (the only senior executive)	The 12 middle managers making up the RMC, headed by the regional director (the only senior executive) Plus a group of 15 middle managers from the OU	17 people made up the strategizing platform: nine middle managers from three selected OU (three middle managers/OU, the OU manager and its two deputies); the regional director (the only senior executive) with the regional financial officer and the regional marketing director; three corporate representatives from the divisions
Agenda of dialogue	The RMC decides to conduct the strategy exercise required at the same time as drawing up the budget, which remains its main task. The strategy dialogue does not succeed in getting over the issue of cutting resources. The dialogue that takes place remains very defensive	The RMC decides to begin an exploration process that the team will not lead to a successful conclusion despite a promising start. The strategy dialogue reaches a stalemate due to tensions within the RMC; the regional director does not succeed in imposing its leadership	The strategic platform thus constituted experiences difficulties with intense debate and conflicts. However, a process of strategy development begins and leads to actions and a formalized and reasoned business plan

**Table IV.**  
The dialogical interactions in three strategizing situations

Two data collection methods were used:

- Method 1 – wide-ranging inquiries.

Three wide-ranging inquiries were conducted, the first in 1997, the second in 1998, and the third in 2001.

The same approach was used in the 1997 and 1998 inquiries. The sample was made up of middle managers from OU and regional head offices and we used a two-step data collection process:

*Step 1.* Quick interviews (1 hour) conducted face to face and over the phone with three middle managers in ten regions (out of 40) framed the in depth face-to-face interviews.

*Step 2.* In depth face-to-face interviews (2 hours each) of 50 middle managers.

The result of these two wide-ranging inquiries were presented and discussed in various committees, including the executive committee.

The 2001 inquiry was focused on the divisional management teams. In total 30 interviews, 2 hours each, were conducted with 26 middle managers and four senior executives:

- Method 2 – action research.

Three regions were chosen (Table IV) to conduct the action research. Within these three regions in depth interviews, individual interactions, observations during seminars and workshops were conducted with 75 middle managers.

### *2.2 Structuring the strategy dialogue: the controversy approach*

In TELCOM, about 4,000 people (all the executives and 3,600 middle managers) were continuously mobilized over a period of seven years in an intense strategizing activity. This means that, even if we only count meetings dealing with strategy and involving at least eight people and lasting a minimum of one day, we can account for several tens of thousands of lively meetings over seven years.

Since the fierce criticism of strategic planning by Mintzberg (1990, 1991) and despite Ansoff's (1991, 1994) comments regarding the coordination of strategy activity, the scale of this problem of mobilizing in time and in space the actors involved in strategizing has been neglected by researchers. Specifically, scholars have not drawn the important lessons from the new sociology of the strategy process. If the research has shown that new players—middle managers—now contribute to the production of strategy (Floyd and Wooldridge, 1992, 1996, 2000), it has not determined the extent that this involvement changed the strategic process itself. Conversely, investigations of strategic practices (Johnson *et al.*, 2007) do not analyze what, in the transformation of practices, emerges from the specific involvement of middle managers. The fact that strategizing is no longer the task of the TMT alone (Burgelman, 1983a, b; Westley, 1990; Wooldridge and Floyd, 1990) profoundly changes the nature of the strategy process. The quantitative question – in our case study, mobilizing 4,000 people over seven years – entails a qualitative change. Strategizing cannot function in a process involving a hundred top managers and some consultants in the same way that it functions in a process with a high degree of uncertainty and ambiguity that involves several thousand top and middle managers. In the company TELCOM, the quantity

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of resources committed to strategy (hundreds of thousands of manager-days over seven years) leads to our formulating the hypothesis of a structure and an act of organizing lying behind such a managerial mobilization. To account for this structure and this act of organizing, we propose the notion of a strategizing controversy.

A strategizing controversy is a discursive process that ensures the focus, continuity, coherence and pacing of an organized dialogue. It circulates basic strategic questions in the time-space of an organization. What situations must we face? Why must we change? What topics should be debated? What are our respective roles and what are the activities and priorities of these roles? Its capacity to mobilize and to transform stems from the organizing devices that it activates, the polemic tension that it sustains, and the creativity that it enables. In our case study, the strategizing controversy is structured around the theme of creating value. It focuses debate around this central theme on two inextricably tied issues. The first issue relates to the content of a new strategy to take advantage of the opportunities presented by the internet and mobile telephony; the second issue relates to the actors likely to be included in the process of developing this new strategy. With regard to this second issue, TELCOM's CEO, arriving in 1995 and learning the lessons of his predecessor's failure, considers the inclusion of middle management in the strategy process as "one of the necessary conditions of the company's capacity to reinvent itself." Until that time, strategy was the fruit of discussion between the board of directors, the executive committee and corporate functional management teams; local actors and therefore middle management were excluded. The CEO's position is far from being unanimously approved by the executive committee. A number of its members openly express their reluctance to include middle management in the strategy process, arguing that they do not possess the "strategic maturity" required.

The strategizing controversy is deployed over three periods, each corresponding to a particular strategy content and to a mode of inclusion-transformation of the actors in the strategy process (Table III). The theme of creating value establishes a central problematic that gives rise to the organizational and cognitive conditions of strategy activity by focusing on and structuring strategy practices at all levels in the organization. In our case study, designing a new strategy requires coordinating the lively activity of 4,000 managers, sharing information, resources (for example, time for meetings) and projects. The strategy process therefore implies new forms of coordination (i.e. new arguments, new structures and new objects of dialogue), new practices and, *in fine*, new roles and identities. The strategizing controversy enables this strategy activity through two processes of organization.

First, the strategizing controversy focuses discursive energy and gives impetus to a complex dynamic of questioning both strategy content and organizational practices. In the case of TELCOM, emphasis was placed over seven years on various strategy contents to develop (a local strategy at the OU level, a regional business plan, a directive to converge investments in the networks and marketing orientations, etc.), which in the very process of their development caused confused situations, dilemmas and contradictions to emerge. By centering actors on a situated strategic intent to make concrete in the "here and now", the strategizing controversy opens up a space for reflexivity with respect to their practices and, *in fine*, to their roles and identities.

The notion of strategizing controversy deepens the notion of strategy paradigm (Johnson, 1987, 1988); by emphasizing the dynamic of strategy practices, it strengthens

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its process dimension. The notions of strategy paradigm and strategizing controversy present convergences. Both assert that, for the most part, strategic action escapes the formulation-implementation model. This is what the reflexive action that produces initiatives shows in the case of TELCOM (see Table V, for instance). Both call into question the preeminence of intentions over actions (Starbuck, 1983; Weick, 1995). Both set out to better understand the processes that organize strategy activity: the places and the moments of allocating and focusing attention (Van de Ven, 1986; Ocasio, 1997). Both suggest an organizational order with weak structural coupling (Orson and Weick, 1990). However, the notion of strategy paradigm provides an explanatory framework that leaves little room for the uncertain dynamic of strategy activity. The strategizing controversy process is more intentional and open to emergence. Thus, the periods of controversy in Table III are not sequences. For each of the three periods of the value controversy, the process was yet to be created, to be given impetus, to be named and to be given greater traction. The moments of successive maturation could not be designated ahead of time. Debates could be sketched out but not taken up or converged immediately or could not meet the organizing devices that would enable a learning process to take place. The story of our company could have unfolded differently and the changes could have happened differently or have not happened at all.

The notion of strategizing controversy draws from the shift towards reflexivity (Weick, 1999) in the approach of organizing (Watson, 1995; Easterby-Smith and Malina, 1999; Johnson and Duberley, 2003) by centering reflexivity on the questioning of organizational routines. Guaranteeing productivity and the reproducibility of operations, routines frame the exploitation work. By construction, they foster strengthening of the practices currently in effect (Nelson and Winter, 1982; Pentland and Rueter, 1994), even if they can guide a continuous process of change (Feldman, 2000; Feldman and Pentland, 2003). By framing and by giving impetus to a strategy process that encompasses the whole company, the strategizing controversy triggers a dynamic of transformation. It provides impetus to a mode of selecting strategy practices that relate to the variation-selection-retention process described by Burgelman (1991).

Second, the strategizing controversy causes a managerial selection. Corresponding to the internal process of selecting strategy practices underlined above, there is a process of selection-transformation of managers enrolled in the strategy process. Routines are certainly embodied in organizational artifacts but also in systems of roles and of identities that are constantly updated in and through practice. The creative destruction of routines can only be performed insofar as the key actors who update the routine system commit to transforming their practices. The strategizing controversy thus enrolls these targeted managers in organizing devices (steering committees, strategic seminars, strategizing platforms (see below)) that authorize and legitimize criticism of the old routines and that allocate time for exploration. It is in and through this reflexive work, framed by the strategizing controversy, that new systems of roles and identities can be discussed, experimented with, and take root.

### *2.3 Strategizing platform: the microprocesses of strategy dialogue and the transformation of roles*

The strategizing controversy provides a global framework that legitimizes and paces exploration throughout a company. Within this framework, strategy practices are

Meetings schedule	Content of the strategic dialogue and major arguments
SPM 1 Early April Curiosity	Discussion of mandate, composition, operating rules and work program of the SP Each OU team presents its BP first draft. Curiosity is shown. Questions are asked. But conversation remains very formal. Actually OU managers don't invest a lot in the meeting, surely because the meeting is not perceived as been very consequential for their practices
SPM 2 Early May Conflict	The presentation of the second drafts of the three BPs triggers the founding crisis: they discover their strongly divergent viewpoints After a heated two-day debate, it becomes obvious to everyone on the SP that it is necessary to talk through the differences. Each team is asked to make clear its underlying strategic assumptions for the next session
SPM 3 Late May Contradiction awareness	The presentation of the third draft of the three BPs brings the different sets of constraints, assumptions and issues of each OU team to the surface Starting to be aware of their different thought worlds, participants in the two-day talk focus on the contradiction in the roles system inherited from the past strategy. They agree on the fact that this roles system is in profound contradiction with their strategic intent: to develop a strategy at the regional level, which entails developing a common thought world Some people explicitly voice concerns that, without change at the roles system level coming from the TMT, it will be impossible to go on with the BP process. After a debate they decide to move ahead and each OU team is asked to integrate the other OU team's hypotheses into its own BP. The idea emerges of having a regional BP that is more than the sum of all OU BPs. The financial director is asked to propose a framework for this regional BP that is supposed to transcend the contradictions of the present roles system
CC 1 Paris – mid June Unvoiced contradictions	Presentation and discussion of regional BPs. Their global inconsistency (some BPs are just three-year "budgets", some are designed at the OU level and the regional level is simply the sum of all the OU BPs) is clear for most participants in the national conference but it remains unvoiced despite intense corridor talks Nevertheless, a general argument against the "organizational silos" (i.e. the roles system) is put forward by many regional teams
SPM 4 Mid June Synergies	The regional BP is accepted as an integration framework Projects are explored, but questions remain as to their legitimacy to explore some strategic questions. Doubt persists. Strong collective commitments (projects), intimating that resources will be allocated and discipline accepted
Roll-out seminars at the regional level Late June	Presentation of the Regional BP approach to the other OUs that were not included in the SPM. Collective appropriation of the construction of an integrative regional BP. A lot of talk about the implication of this Regional BP on the regional roles system and the new relationship it entails with the Corporate level

(continued)

**Table V.**  
The dialogue process that the strategizing platform created over a period of nine months



Meetings schedule	Content of the strategic dialogue and major arguments
SPM 5 Early July Project portfolio	Ongoing difficulties in configuring a shared projects portfolio, which limit the ability to move to the execution phase. A common prioritization, necessary to allocate resources, is still hindered by different views
CC 2 Paris – September	The regional BP is presented by the platform team. The presentation finds considerable resonance with regional managers gathered. Peer contacts are initiated. Groups of regional managers start to network, to talk the talk and to share good practices: private dinners, conference calls and on site visits are organized
SPM 6, 7 and 8 Late August, late September and late October Project reviews)	Certain projects fail to move forward due to a lack of commitment. Some actors explicitly say that what is asked of them by the strategizing platform is contradictory to their day-to-day tasks. The strategic dialogue is losing its momentum. The regional director calls for a meeting with a small group to talk about the future of the SP. The decision to halt proceedings is taken
CC 3 Paris – December Breaking the deadlock	Most of the regional management teams recognize their difficulty in moving forward in terms of strategizing Owing to difficulty in moving to the next strategizing steps, the idea of creating a network of entrepreneurs is suggested and discussed. A critical question is soon raised: who will be the members of this network? The inclusion/exclusion controversy is launched and will gather strength over the following months

**Notes:** Glossary: SP, strategizing platform; SPM, strategizing platform meeting, each meeting lasts two days; BP, business plan; OU, operational unit; CC, corporate conference, each conference lasts one day, gathers at least 200 people, coming from each region (40 regions) and each division (five divisions)

Table V.

nonetheless very heterogeneous. Some teams pass the strategy test with great success whereas others perform less well. The global framework does not guarantee success.

At the outset, this global framework is what they have in common. The strategic arguments provided and the outcomes expected are the same. Therefore, the only difference resides a priori in the dialogical interactions that take root in local practices (Table I). In one of these regions (situation 1), the strategic exercise required in this second period of strategizing controversy soon proves to be a complete failure (Table IV). The regional management committee (RMC) establishes itself as the strategy team in charge of conducting the exercise required. The RMC and the regional director did not give to middle managers selected the mandate to initiate strategic exploration. The RMC decides to conduct the strategy exercise required at the same time as drawing up the budget, which remains its main task. The strategy dialogue does not succeed in getting over the issue of cutting resources. The dialogue that takes place remains very defensive. In the second region (situation 2), a process is initiated and development work begins but then grinds to a halt in midstream. The RMC decides to make itself the strategy team by deputizing, for these meetings, representatives of the OU. The RMC decides to begin an exploration process that the team will not lead to a successful conclusion despite a promising start. The strategy dialogue reaches a stalemate due to tensions and conflicts within the RMC; the regional

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director does not succeed in imposing its leadership. Finally, in the third region (situation 3), a dynamic is begun that goes all the way to completion. In fact, a questioning of roles systems occurring simultaneously with the confrontation between strategic contents is performed in this situation alone. In the other two situations, strategic dialogue struggles to find a place and in the end conforms to pre-existing routines. Presenting dialogical interactions according to time, organization and agenda criteria, Table IV shows the dynamic of the microprocesses at play. Notably, it underlines the significance of the duration and pace of dialogue, the composition of the strategizing group and, especially, the importance of the mode of dialogue established within the group. Table V displays the dynamic of the strategy dialogue that was established in situation 3. In this region, the strategizing platform set up for the occasion decided upon a schedule of two-day meetings. These meetings would focus on the simultaneous and coordinated development of business plans for the OU concerned. Between each seminar, the work of strategy continued in each OU as well as in the transversal groups decided upon by the platform. This work on strategy had to refine the unit's business plan and prepare for the subsequent meeting. Numerous encounters, either bilateral or in small groups, as well as telephone contact punctuated the platform process and drew from its dynamic. Meetings are structuring moments of a complex process that cannot be reduced down to the meetings themselves. In total 17 people made up this strategizing platform. Nine managers heading three OU[2] (three managers per OU) and the regional director (the only senior executive) formed its central core. Added to this core were the regional CFO and the director of marketing, three representatives of the divisions and two researchers – the authors of this article.

Situation 3 (see Tables IV and V) is the only one out of the three that produces content and strategic actions. It is the establishment of a strategizing platform that differentiates it from the two others. This establishment opens up *de facto* a debate about the roles system. This debate begins with the selection of participants for which criteria must be defined. It continues with the mandate and the outcome of the platform that must be relentlessly refocused. It is permanent since the accepted mandate goes against habitual practices. The demand for coherence with the accepted mandate triggers an unprecedented mode of discussion and argumentation. Even if the actors know each other, they see each other in a new light as each one, advocating his own perspectives for results, lays out his constraints, his goals and his ways of thinking. The exchanges are lively. Actors voice their surprise at not having exchanged views in this way previously. For instance, they provide each other with geographical maps relating, for some, to the location of their clients, for others, to the location of available infrastructures, and for yet others, to the location of areas of major failings in the landline network. By superposing these maps, they realize the disparity between the location of clients – and in particular, clients with high potential demand for telecommunications – and the location of the technical support needed to provide offers with high potential for value creation. Concluding that the technical resources are not located where the high-potential clients, on which the sales branches are counting, are to be found, a manager from the technical unit, by provocation, suggests moving the clients [...]. From this exchange, a shared project in marketing is born. Thus, the issue of the role that they now have to play to design technical investments that are in line with a segmentation of target clients emerges from this provocation and the exchanges that ensue. The interlocutors therefore appropriate

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for themselves the roles that correspond to the mandate to which they conform slowly but surely.

Consistent with this mandate, a specific vocabulary is fostered that is made up of references in terms of scenarios and assumptions rather than in terms of failures and problem resolution; this includes the systematic use of financial measurement to weight arguments (Denis *et al.*, 2006). The experience of the platform's actors constrains their creativity. As engineers involved in building or running telecommunication infrastructures, they design the scale of operations and plan their development. Subsequently, when managing their unit, they have to allocate resources. Now, an imperative for financial results is asserted. The three-year plan requested does not substitute for the budget, which, although slightly revised, remains in place. In fact, we were able to observe in some OU that, in the absence of a platform as described above, the two activities (budgeting and strategy planning) were carried out in isolation and sometimes implicated different actors within the unit. The discipline of creativity imposed by the activity of business planning calls into question the ways of thinking and the roles systems that correspond to these ways. First, they are not allowed to address the issue of the whole package of services on offer, what it contains or how it is deployed. Then, when they begin to do this, they think that they do not have room for maneuver in this matter, and therefore do not have a grasp on the revenue column of the profit and loss statement (P&L). Equally, while ever they have not experimented with a dialogue between OU regarding their respective economic assumptions and the synergies they can build, they think that they cannot act on how resources are allocated, and therefore do not have a grasp on the costs column of the same P&L. Likewise, they do not think that the operating margin is, at the end of the day, anything but a subtraction. They do not see it as a variable with changes that may force them to rebalance revenue and costs.

It is with this rebalancing that they experiment within the platform. It is what triggers a process of transformation of the roles system. The following passage presents some elements from this debate (see quotations taken from the "verbatim" of the business plan platform's seminars – situation 3).

*The P&L: a dialogical object at the heart of major socio-cognitive learning*

This object is ambiguous, recent ("We don't control the content"), valuable ("It is proof of our responsibility, and part of our remuneration depends on it") and debatable ("It doesn't give a full picture of our activity. It agglomerates data on which we have no capacity to act and includes other things that relate to split responsibilities based on compromises negotiated at Division level").

The process of its appropriation as a socio-cognitive learning support is shown in Figure 1.

Diagrammatic representations of the P&L are imagined, sketched on the white board during seminars and debated:

- *Sketch 1.* The two columns are envisaged separately. Often, different people manage each one. They are only compared at the moment of budgeting. Room for maneuver is sought in each of the columns, but it seems limited: "Revenues are either calculated on the basis of sell-off prices and of compromises outside our purview or else depend on tariffs that we do not control. So, we try to act on what

- we think is all we have in hand: one part of the revenue, and not the largest part either [...]”.
- *Sketch 2.* As a capacity to act is slowly discovered, a more analytical approach is tried by comparing revenue and costs, for each action undertaken (“One argument, one action, one figure [...]”). But it is noted that: “Presented in this way, actions then become fairly marginal and have little impact on the overall result”.
  - *Sketch 3.* Furthermore, the problem becomes more complex: “The result (“R”) becomes a variable. We will now be required to produce a level of R. If we have little room for maneuver with regard to revenue, we then have to look at costs and therefore at the organization and cooperation between units”. The socio-cognitive construction of the “R” becomes more focused. Several meanings are successively attributed to it: a requirement level imposed top-down, a balance in a simulation, an ambition we set out to achieve [...]].
  - *Sketch 4.* In fact, a conviction is forged: “We must change our way of thinking and not make a fetish out of the P&L. It is first and foremost a tool for exploring and simulating, even it is becomes at one point almost contractual and forms the basis of our engagement with respect to our bosses”.

Each confrontation that experiments with a way of thinking on the basis of the P&L borrows elements of vocabulary and of the organizational routine relating to roles held until now by others – division or corporate managers or experts. Each time one or another manager on the platform borrows vocabulary from the experts, he underlines this point: “I’m now talking like a financial manager”. They do not fail to point out the role and the position of the person who usually takes on this role: “How much is (with a wave of the hand) your project worth? [...] I’m doing the job of an accountant”. In a kind of counterpoint to the main discussion centered on the argument, a discussion about the distortions between ways of arguing and roles emerges, and therefore about the variances between, and changes in, roles.

Likewise, a style of leadership is fostered that gives primacy to strategy engagement over operational efficiency and functional expertise. Thus, the establishment of the platform and the constant reminder of its specific mandate opens up a simultaneous dual process of fabricating strategy content and of transforming the roles system of the participating actors. It is in this way that, fundamentally, situation 3 stands out from the other two situations.

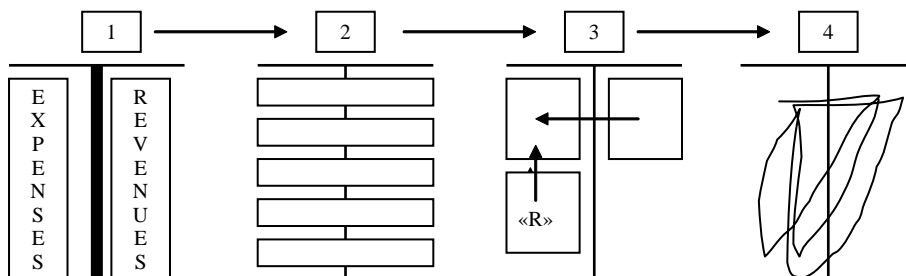


Figure 1.

### 3. Conclusion – limits, lessons and implications for research and practice

Our research illustrates the value of an in-depth analysis of a business case study (Yin, 2003) from a longitudinal perspective (Pettigrew, 1990), by varying the local situations so that patterns can be identified (Siggelkow, 2007). This approach is well suited to this study because we have conducted similar studies in several large international companies, albeit in lesser depth. Despite the diversity of companies, similar contexts of strategic change imply comparable experimentation in strategic practices, in particular, we noted the same microprocesses of managerial transformation and the same evolution of roles, providing the conditions of organization and the framing of mechanisms were met.

From this longitudinal research we draw four lessons.

The first lesson regards the place of practices in strategizing. Research has demonstrated that strategy is not limited to the TMT realm, but that middle managers also do strategy, playing two major roles: a role of interpretation-translation of the strategy coming down from the TMT, and a role of influencing going up the formulation process (Westley, 1990; Floyd and Wooldridge, 1992, 1996, 2000; Dutton and Ashford, 1993; Balogun and Johnson, 2004). Even though significant findings drawn from recent research show a more complex reality, the strategy process continues to be modeled mainly in terms of the formulation-implementation sequence; there are just many more people involved in the sequence and the process is a little bit messier. In our case study, the fabrication of a strategy assumes a transformation of practices that is performed neither after nor in parallel to strategizing, but lies at the very heart of this activity. The formulation-implementation sequence is nourished by a transformation sequence that is enabled by a complex process of deframing-reframing that is given impetus and structure by a strategizing controversy. In situations of radical change, the conception and the facilitation of the deframing-reframing process shape the heart of strategizing.

The second lesson stems from the first and gives it greater focus. It results from the attention paid to the paradox that is illustrated by our third strategy situation (Table V). Observing the interactions at play in this situation, we note that, while a dialogue and often intense debate surrounds the content to be developed (here, the business plan), an underlying debate regarding roles is also triggered and follows its course. This debate is touched upon at each exchange. Each question regarding content (for instance, developing a new service, a new investment in the network, a partnership) raises a question regarding the role system. Each question is thus explicitly accepted and dealt with at the same time as the question relating to strategy content being discussed. It is precisely because the actors engaged in the strategy process accept to deal with this question of the role system and its transformation that the strategy dialogue can move forward. In stark contrast, the failure of the other two situations analyzed (Table IV) stems from the impossibility of a simultaneous dynamic of rebuilding roles and fabricating strategy content. In these two situations, the directors of the regions in question want the strategy exercise to fit the existing roles system. Clearly seeking to separate the formulation of strategy and the transformation of roles, the strategic action aimed for (developing a three-year business plan) fails.

The strategic creativity revealed by situation 3 stems from the opening up of dialogue related to the transformation of the role system. Although the strategy dialogue is not a priori centered on the issue of roles, it nonetheless grants it a preponderant place. Furthermore, the actors enrolled in the strategy process only

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accept to engage in it, while they strategize, they can rebuild their roles and fabricate themselves as actors of strategy.

The third lesson concerns the meaning of the new management model at the middle manager level. The managerial roles, whose emergence and construction within mechanisms of strategic creativity were examined, are often portrayed as functional characteristics and properties specific to individuals (Mintzberg, 1973, 1975; Yukl, 1981; Bass, 1981, 1985; Quinn, 1984). In our approach of the emerging managerial model, the expected and practiced roles are based on a repertoire, a portfolio of capacities mobilized according to the context.

The complexity of the context, which affects the level of creativity required by the middle managers, assumes that this model is also, above all, a medium for conceiving and applying multiple and contradictory roles. In exercising their position, middle manager strategists must play a complex game, made up of brief and successive mobilizations of capacities, in conditions and structures that they must often infringe. Individual interviews with managers in situation 3, particularly those conducted toward the end of their participation in the strategic platform, show that they must arbitrate between the emerging roles of their participation in the platform and their usual roles as directors of their OU. In addition, they must reorganize their personal agendas and redeploy some of their activities to other managerial levels within their unit. At the same time, they question the long-term consequences, because they are unsure of the sustainability of this transformation of the managerial position.

The fourth lesson concerns the middle manager's sense of belonging. How can middle managers face strong variations, sometimes U-turns, in the strategies they help to formulate, and construct a long-term professional trajectory at the same time? This trajectory can no longer run parallel to that of the company. The managers must align it with the company but also be able to dissociate it in order to master it.

It is thus understandable that middle management is expectant. Its contribution to innovation and business strategy is now solicited, although the strategic game is largely beyond their reach. Whereas they often put their own professional path in phase with that of the company (Whyte, 1956), many factors contribute to the dissolution of this bond (Arthur and Rousseau, 1996; Bartlett and Ghoshal, 1997) and to the crystallization of a sense of vulnerability. The strategies they help conceive and apply appear dependent on a complex set of external factors that they find difficult to grasp. The often brutal evolutions that result seem to be increasingly divorced from the strategic initiatives that they are asked to take. The example of managers in situation 3 shows that they are firmly engaged in this exercise of strategic creativity only after a lengthy evasion process. Interviews conducted during the final seminars of the platform indicate that they have strongly and proudly adopted their position, which they even see as a challenge, *vis-à-vis* the executive committee of the company, but question career issues. Specifically, they ask "If the values that we must embrace now carry higher risk, mobility and flexibility, why not apply them to our career management?" Middle managers must then take greater charge of their careers and become strategists for themselves, by building their own professional projects and dissociating their projects from that of the company.

By developing a process-based approach to the strategic process based on analysis of microprocesses of transformation, we established a theoretical link between the advances initiated by the proponents of the "practice turn" (Chia, 1995;



Schatzki *et al.*, 2001) and the new approaches to the strategic process (Szulanski *et al.*, 2005). Our main theoretical contribution lies in the analytical chart of strategic practices proposed in Table I. By dynamically linking the discursive interactions and their physical supports, at the various organizational levels where the interactions take place, the analytical chart provides a holistic approach to the transformational affects of strategic practices.

Two propositions formulated in this study advance the research on the sociology of strategic process. First, we demonstrate how it is precisely because the actors engaged in the strategy process are willing to consider the question of the role system and its transformation that the strategy dialogue can move forward. The key element is the simultaneity of the construction of roles and the formulation of the content of the strategy by the actors undergoing transformation. Second, the simultaneity needs to be given concrete form and implemented. This proposition reinforces earlier studies (Law and Mol, 1995; Knorr-Cetina, 1997) and more recent investigations into the role of objects, artifacts and materiality in theoretical accounts of organizing (Carlile, 2002; Orlikowski, 2007; Nicolini, 2009). This double research result lets us go beyond simply describing the increasing complexity of the sociology of the strategic process and theorize about the constructive interactions that characterize the transformation of organizations.

Researchers have underlined problems raised by the inclusion of middle managers in the strategy process, specifically problems of political positioning within teams and managerial levels, problems of identity and professional paths for these managers. Nonetheless, the theoretical and methodological means to understand the microprocesses at play in the inclusion of middle managers in the strategy process and their transformation into strategists have yet to be defined, although understanding these microprocesses is important to help companies better conceive and apply their policy of including middle managers in the strategy process. This entails the definition of activity content and new skills required, along with career and loyalty building, and of the forms of organization in which middle managers evolve and develop. In this sense, the approach we proposed can be practical for companies and their stakeholders facing these challenges.

### Notes

1. The TELCOM group was at that time split into 40 regions. Outside France, the organizational unit is the country or the geographic zone. Each region has between 2,000 and 5,000 employees and accounts for annual investment of between €200m and €600m.
2. Here, we are dealing with three types of OU typical of a telecommunication company: an infrastructure construction unit, a network operations unit and a sales unit. There are 200 OU and one region is made up of three to eight OU depending on its size (turnover, client mix, etc.). In the case detailed here (five OU), not all the region's operating units are represented on the platform.

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