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The Strategy Conveyance Process in IT Services: How entangled spaces enable strategy practitioners to make sense of tensions over time.

HENLEY BUSINESS SCHOOL

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Research thesis submitted for the degree of Doctor of Business Administration

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Declaration

I confirm that this is my own work and the use of all material from other sources has been properly and fully acknowledged.

Certificate of readiness to be included in library

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Dedication

I dedicate this work to my dog Teasel who has been my constant companion throughout, demanding walks that made me rise from my desk and take much needed exercise and allow me to think and reflect.

Abstract

Purpose – To theorise how strategy practitioners use different communication practices to support sensemaking about the tensions inherent in IT portfolio strategy in fast moving IT services. Exploring the role of narratives texts and discursive activities in conveying salient tensions affecting current and future praxis.

Findings – This study offers something novel by way of presenting how the conveyance[1] of strategy process unfolds over time through a series of inter-related and flexible spaces that bridge the sensegiving-sensemaking process. The spaces act to assemble practitioners, practices, and tensions, exhibit flexible boundaries, and instil movement in a sequenced flow overtime. Each conveyance space is characterized by types of metaphors, sensegiver attributes, and sets of tensions that surface within or across spaces that become relevant and salient for sensegivers/sensemakers.

Theoretical contributions – This study contributes to the calls for more focus on actionable knowledge for strategy practitioners (Jarzabkowski and Wilson, 2006; Splitter and Seidl, 2011), to study paradox as process and practice (Jarzabkowski, Lê and Bednarek, 2018), to decide what practices are strategic (Jarzabkowski, Kavas and Krull, 2021) and finally, begins to connect SAP research to other domains (Kohtamäki *et al.*, 2022).

Design/methodology/methods – This constructionist grounded theory longitudinal study was conducted in a Portfolio Management business unit of a large enterprise IT Services company, with data gathering via interviews, observation, and primary document analysis. Findings were emergent from the data and then analysed using bodies of literature across a combination of the Strategy as Practice (SAP), Organizational Space, and the Organizational Paradox domains.

Research implications and areas for further research – This study illuminates strategy practitioners use of spaces to work through their understanding of tensions over time, and the entangled role that narratives and texts play within that process. It suggests fruitful connections between strategy as practice and the domains of organisation space, paradox and the socio material interdependence between agents and the artefacts they employ.

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[1] Definition of conveyance:
- the action or process of transporting or carrying someone or something from one place to another
- the action of making an idea, feeling, or impression known or understandable to someone. [Source: https://www.bing.com, accessed 19th October 2022]

Practical implications – Organizational leaders must comprehend that the conveyance of IT portfolio strategy is a process, one inherent with tensional 'spaces' throughout the journey. Leaders need to establish consistent narratives with supporting texts, using clear language and relevant metaphors, along with exhibiting a set of sensegiver attributes that work to highlight and mitigate tensions for the practitioners experiencing the process.

Originality/value – This thesis offers some explanation of the organizational spaces, sets of tensions, and metaphors that affect the sensegiving/sensemaking of practitioners during the conveyance of IT portfolio strategy, and a conceptual framework illustrating the strategy conveyance bridging process (SCBP), itself an example of a socially interactive process.

Keywords: Strategy as Practice (SAP), Strategy conveyance, Organizational Space, Tensions, Narratives, Texts, Sensemaking, Sensegiving, Metaphors, IT Portfolio Offering Management, Time.

Contents

List of figures

List of Tables

List of Memos

List of abbreviations

CP	Conversational Partner
CPI	Cloud, Platforms, and Infrastructure Technology Operations (ITO)
CPS	Cloud and Platform Services (previously known as CPI)
EVP	Executive Vice President
GTM	Grounded Theory Method
NewCo	SpinCo and external 3rd party company merger
OM	Offering Manager (the sensemakers within this study)
PoI	Plan of Intent
PoR	Plan of Record
RemainCo	Company that remained after spun out company exited
SAP	Strategy as Practice
SG	Sensegiver
SI	Symbolic Interactionalism
SM	Sensemaker
SME	Subject Matter Expert
SpinCo	Spun out company
SplitCo	Parent company split into two entities
SVP	Senior Vice President
IT	Information Technology
UoA	Unit of Analysis
VP	Vice President (the sensegivers within this study)
W&C	Workload and Cloud (W&C), the previous business unit name of CPI / CPS.

Definition of terms

Practitioners: "Practitioners are strategy's actors, the strategists who both perform this activity and carry its practices.", and "strategy practitioners are those who do the work of making, shaping and executing strategies." (Whittington, 2006, p. 619).

Within this study, the practitioners referred to, are those organizational actors of the Portfolio group that are tasked with conveying, designing, developing, and releasing to market the service offerings of the study organization.

Practices: Refers to "shared routines of behaviour, including traditions, norms and procedures for thinking, acting and using 'things', and there are strategy practices that practitioners typically draw on in their praxis" (Whittington, 2006, p. 619).

Within this study, practices refer to the shared IT portfolio management routines e.g., meetings with defined agendas, e.g., SteerCos, Extended Leaders Calls, and the use of 'things' such as, Microsoft PowerPoint [2] (PowerPoint) presentations with defined content, e.g., Plan of Record, Strategic Business Plan, and the narratives related to the conveyance of strategy process.

Process: IT portfolio management of technology products and services, is the "process of conceiving, defining, delivering, monitoring and refining products in, and withdrawing products from, a market in order to maximize business results."[3]. IT portfolio management though is not just a single process but is comprised of multiple sub-processes such as, strategic product planning, strategy conveyance, financial management, human resource planning, application development, service management, etc.

Consistent with the strategy as practice definition, IT portfolio product/services management is everyday strategy work (Vaara and Whittington, 2012; Jarzabkowski, Spee and Smets, 2013) which constitutes the daily work of IT portfolio leaders and offering managers.

Praxis: Refers to "actual activity, what people do in practice.", and what "practitioners actually do is strategy praxis – all the various activities involved in the deliberate formulation and implementation of strategy." (Whittington, 2006, p. 619). The flow of work is considered praxis (Jarzabkowski, Spee and Smets, 2013).

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[2] Microsoft, PowerPoint is a trademark of the Microsoft group of companies.
[3] Gartner, Definition of Product Management (Digital Business) - Gartner Information Technology Glossary. Accessed 12/05/2023.

For this study, praxis refers to the work of portfolio strategy conveyance and the sensegiving-sensemaking processes within and throughout the strategy conveyance bridging process.

Sensegivers: Those organizational practitioners responsible for the conveyance of portfolio strategy. Sensegiving, is defined by Gioia and Chittipeddi (1991, p. 442) as both the "process of attempting to influence the sensemaking and meaning construction of others" and an "interpretative process". Within this study the sensegivers are those portfolio leaders conveying strategy.

Sensemakers: Those organizational practitioners having portfolio strategy conveyed to them. Within this study, sensemaking is defined as "a social process of meaning construction and reconstruction through which middle managers understand, interpret, and create sense for themselves and others of their changing organizational context and surroundings." (Rouleau and Balogun, 2011, p. 955). Within this study the sensemaking practitioners are termed portfolio Offering Managers (OMs).

Spaces: "Organizational space refers to the built environments that emerge from organizational activities, objects, arrangements, and social practices." (Stephenson *et al.*, 2020, p. 797). Within this study space(s) refers to those organizational spaces, both physical and virtual, that are socially created and act as containers of evolving experience, over time, for the portfolio practitioners.

Strategizing: "strategy work ("strategizing")" (Vaara and Whittington, 2012, p. 286). In this study 'strategizing' refers to the work of the collective Portfolio Management team, including the Offering Managers.

Tensions: "As organizational actors encounter incompatibilities and dilemmas, they experience tensions, defined as stress, anxiety, discomfort, or tightness in making choices and moving forward in organizational situations" (Putnam, Fairhurst and Banghart, 2016, p. 68).

For this study, tensions refer to those challenges, issues, problems, concerns, etc. that portfolio practitioners face through the conveyance of portfolio strategy, as a sensegiving-sensemaking process.

1 Introduction, context, and purpose

"All the world's a stage" - William Shakespeare.

1.1 Introduction

This research was initially motivated by the absence of studies in the SAP literature looking at the way interactions between sensegivers and sensemakers **over time** involve socially constructed paradox and tension that can derail strategic direction. Ultimately it speaks to more recently identified disconnects between discursive and sociomaterial aspects of sensemaking in the SAP literature and the way process and practice are dynamically intertwined in micro level strategizing. Within organizations striving for survival, the need for clearly articulated, well understood, and implemented strategies is pivotal to the sustainment and growth of an organization (Mintzberg, Ahlstrand and Lampel, 2009). Understanding how and when tensions surface during the conveyance of strategy and the impacts that has on the sensegiving-sensemaking process is important for both knowledge and practice.

A longitudinal qualitative study of a Portfolio management group within an IT company provides an intrinsically valuable context for studying the paradox of continuity and change, inherent in all strategizing processes, because it is dynamic and involves frequent changes to strategy. It offers many opportunities to understand how actors handle the socially constructed tensions that emerge from that.

Thus, this thesis presents a study of the tensions affecting the conveyance of strategy for action, through the media of narratives and texts. Unlike earlier work within the Strategy as Practice (SAP) field that focused on either the sensegiver or the sensemaker communities within organizations, this research focuses on the bridging process and practices between a distinct group of organizational sensegiving leaders (SGs) and their direct reports i.e., those sensemaking offering managers who are tasked with the development and management of IT products/services (SMs). The strategy conveyance process and practices form a pattern of strategic actions (Jarzabkowski, Kavas and Krull, 2021), in the organization studied during a period of ongoing strategy conveyance.

Understanding the types of tensions, how they become salient (Knight and Paroutis, 2017) and are experienced for the SGs and SMs, as strategy practitioners, through the ongoing

conveyance process helps to illuminate the micro-practices and organizational spaces occurring during strategy conveyance rather than focusing on the strategy formulation arena widely covered in previous literature.

Using a combination of conversational partner (CP) audio recorded interviews, observations and primary strategy conveyance documents gathered over a 5 year timeframe (2014-2019), I first explore the sensegiver perspective, describing the overall context and initial emergent themes; second I discuss the narrative patterns emerging from observing the sensegiver to sensemaker strategy conveyance process in action; thirdly I examine the genre of documents utilized during periods of strategy conveyance; and finally, I explore the tensions arising through a series of spaces from both the sensegiver and sensemaker view-points.

In this introductory chapter, I explain my personal interest in wanting to understand the tensions that emerge during strategy communication; provide detail of the evolving organizational context where the study was conducted i.e., the site of this researcher's own practice at that time, making me an insider-researcher; give a brief outline of the analytical frameworks drawn from; the visual metaphor utilized to help frame the research journey, and the aims, objectives, and research questions.

1.2 Background

Organizations adopt strategy in a bid to both survive and grow in a changing competitive landscape. Strategy can be both deliberate and emergent (Mintzberg, Ahlstrand and Lampel, 2009) because it always involves multiple practitioners with different roles in creating, executing, and actioning key organizational objectives. Sensegiving (Gioia and Chittipeddi, 1991; Maitlis and Lawrence, 2007) happens in one time frame and at one level of the organization; sensemaking comes later and sensemakers may have different priorities in the delivery process (Rouleau, 2005). Consequently, strategy inherently contains a mass of tensions (Sparr, 2018) and the process of conveying that strategy through narratives and texts (Jarzabkowski, Spee and Smets, 2013) may not adequately give voice to the dualities involved in maintaining continuity of service at the same time as delivering required growth (Farjoun *et al.*, 2018). Although sensegivers and sensemakers may all be part of a single group responsible for managing the portfolio of products and services, working in different time frames, and having different priorities in their roles may distort the interpretation and translation of the strategic objectives into practice.

The sensegiving and sensemaking individuals of the Portfolio Management group within the researched organization have joint responsibility to innovate, create, distribute, and maintain competitive services for the organization. So, as practitioners they have a fundamental need to both understand and enact strategy in their daily practices that both *sustain* existing go to market IT service offerings, while also developing new offerings that will be future *growth* engines for the organization (e.g., simultaneously exploring and exploiting (March, 1991; Andriopoulos and Lewis, 2009; Smith, 2014; Gregory *et al.*, 2015)). Effectively the Portfolio Management team must manage through the tensions of continuous change (Jay, 2013), but also maintain a level of stability (Vaara, Sonenshein and Boje, 2016) for those offerings already released and currently generating revenue streams (Andriopoulos and Lewis, 2009). Consequently, by its very nature, the process is full of paradox and tension.

This practitioner enactment of strategy sits within an academic domain known as Strategy-as-Practice (SAP) and encompasses not only what strategizing practitioners do ("actors involved in strategy-making"), but what practices they employ ("tools, norms, and procedures of strategy work"), and how they conduct their daily practices (praxis, defined as "activity involved in strategy-making"), (Vaara and Whittington, 2012, p. 287).

The way in which strategy is conveyed within and throughout an organization, the organizational tensions (Smith and Lewis, 2011) that affect those communication exchanges and, the mechanisms used to convey strategy (Fenton and Langley, 2011) may well affect practitioner understanding and hence their choice of tools and praxis.

Practitioner sensemaking is a process of interpreting information and events giving them subjective meaning that prompts action towards goals (Gioia and Chittipeddi, 1991). Sensegiving is an attempt to influence and change existing sensemaking and gain support for an alternative perspective (Rouleau, 2005). Both affect strategic change outcomes, and both involve sensemakers and sensegivers in bridging a gap between now and an unknown future. In doing so each must engage with sense-breaking (Schildt, Mantere and Cornelissen, 2020) which challenges their current understanding, but that sense-breaking happens at different times and with different groups of stakeholders each with their own sets of priorities around the sustain and grow mandate.

As Dervin (1998, p. 39) highlights, sensemaking involves "travelling through time-space coming out of situations with history and partial instruction, arriving at new situations, facing gaps, building bridges across those gaps, and moving on". Additionally, if managers (acting as sensegivers) are to craft compelling messages that cause positive action then the "content and nature of conversations matter" (Rouleau and Balogun, 2011, p. 954).

These narrative practices of sensegiving and sensemaking then become the 'bridge' that iteratively attempts to close the gap between sensegiver and sensemaker understanding. Both sensegiving and sensemaking practitioners have equal influence on the interpretation of the conveyed strategy. The sensegivers initially as sensemakers will have already performed some provisional processing prior to their conveyance of strategy, and then as they convey, the sensegivers intent is to inspire and promote questioning from the sensemakers and foster creativity (Schildt, Mantere and Cornelissen, 2020).

How strategy is conveyed, the content and delivery of the narratives and texts used and the tensions surrounding this process of communication for both sensegivers and sensemakers must have a profound effect on their actions.

If we envision strategizing, strategy enactment and practitioner work towards the attainment of strategic objectives via the metaphor of a suspension bridge, cycles of practitioner praxis can be thought of as the process of sensegiving and sensemaking using narratives and texts necessary for understanding, and often surrounded by external forces/tensions (Figure 1-1).
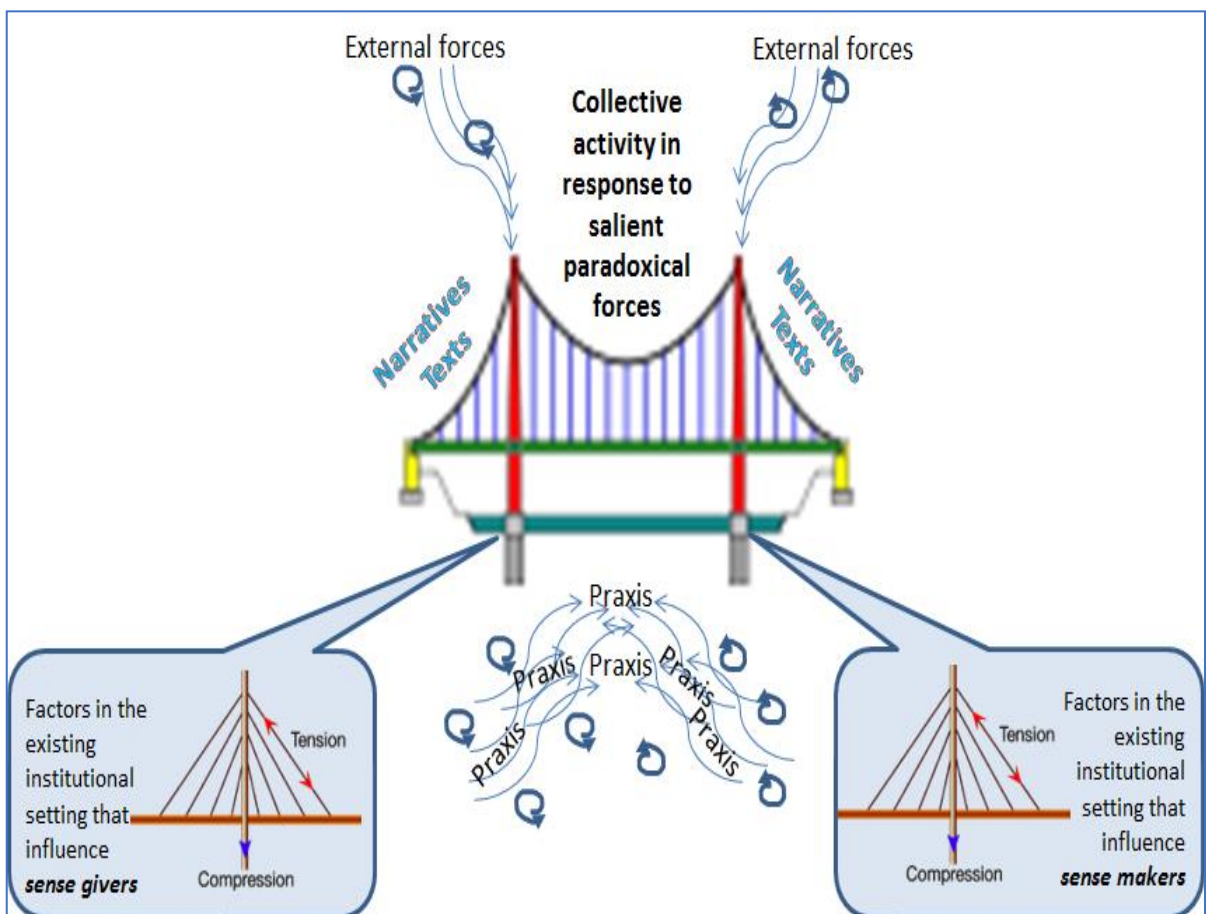
Figure 1-1: Visual representation of suspension-bridge metaphor

A suspension bridge, rather than a fixed structure, is held simultaneously in a state of both stress/tension (cables) and compression (beams) that support a roadway from one side to the other. If strategic narratives and texts are the 'cables and beams' that hold the tensions, they then need to be strong, viable cables and beams, (through clear, consistent language and messages) to support the whole bridge allowing practitioners to align their understanding. If at any point the cables are weakened, i.e., the narrative/textual practices scramble the messages of strategic direction, then the whole structure becomes unstable and may even break.

Now, likening praxis to the external forces applied to the bridge e.g., inclement weather and swirling winds, these forces in the form of practitioner activities through daily practices or formal strategic practices that promote change (Jarzabkowski, 2003), can act to destabilize practitioner interpretations and sensemaking causing the whole structure to sway and bend while it attempts to reach a state of calm again.

Further, practitioner actions triggered by the way they make sense of the narratives and texts will create impacts on the sensemaking/sensegiving of others especially if they are in a position of influence. Consistent narratives and texts that mediate these possible contradictions between practitioners during praxis should help to connect those sensegiving and sensemaking individuals (Jarzabkowski, 2003) enabling them to reach shared understanding, and move forward.

1.2.1 Professional interest

The implementation of Western commercial organizations strategies has been linked to the achievement of growth and sustained competitive advantage for organizations by several scholars over several decades (Teece, Pisano and Shuen, 1997; Porter, 2004; Grant, 2008). During the last 20+ years a growing movement has gathered pace wanting to understand what practitioners 'do' when they perform 'acts of strategy' with the aim of uncovering what practices and activities support, guide and enable successful strategy execution (Whittington, 1996; Jarzabkowski, 2005).

The interest in this area of 'what strategy practitioners do' to enable growth building strategies and organization sustainment is driven from my extensive practitioner experience of the IT Outsourcing/IT Services Industry and practitioner role as a large business units Director of Strategy for a Fortune 500 IT Services organization.

While working in strategy-related positions for well over 20 years I, as a strategy practitioner, have been puzzled by the inability of the organization to convey its portfolio offering strategies for sustainment and growth in a compelling manner resulting in relevant action.

The organizational conveyance of strategic direction often did not result in Portfolio Management team practitioners evaluating their current approach to activities, or any substantial alteration in their daily actions.

I then, wanted to understand how this disconnect occurs and uncover insights that could be practically applied to improve the conveyance of strategies for aligned action. Additionally, my privileged position as an insider researcher allowed me access that another researcher would struggle to gain, and importantly provided deeper insights in terms of interpretation and meaning.

1.3 Organizational context

The organizational business unit where the research was conducted is that of the Portfolio Management group within a very large, global Information Technology Outsourcing service provider. The Portfolio Management group within the Cloud and Platform Service business unit (CPS) I liken to an organizational entrepreneurship/intrapreneurship function (Hernández-Perlines, Ariza-Montes and Blanco-González-Tejero, 2022) housed within a wider company. The company itself is one of the breeds of excessively large-scale global IT Services organization often researched in relation to IT Outsourcing (Kotlarsky, 2010; Burton, 2013; Gopal *et al.*, 2020) but the CPS business unit is small by comparison.

A good description of CPS' function is captured well in the words of Bartel and Garud (2009, p. 108) "(1) the creation of new ideas (Usher 1954), (2) the commercialization of these new ideas into valuable products and services (Van de Ven et al. 1999), and (3) the sustenance of these processes over time (Tushman and O'Reilly 1996)".

CPS is made up of a cross-section of staff with multiple skill sets from many business disciplines and forms the innovative heartland of the go to market portfolio function. The individuals within CPS are tasked daily with developing and launching into the market new service offerings for client purchase and consumption in support of their own businesses.

The recurring corporate need was expressed internally as one of profitable growth with consistently reducing budget and this mantra impacts greatly on CPS through both an instilled urgency to act (produce) and in the number of strategic artefacts both communicated to and produced by the organization.

The CPS business unit is responsible for a continuous cycle i.e., it is an on-going activity, of idea generation and exploitation (sustainable innovation over time) in a collaborative venture (Bartel and Garud 2009) and contains the primary participants supporting the many twists and turns in the execution of the organization's prime strategy, i.e., attain growth through compelling, market competitive service offerings (Figure 1-2).
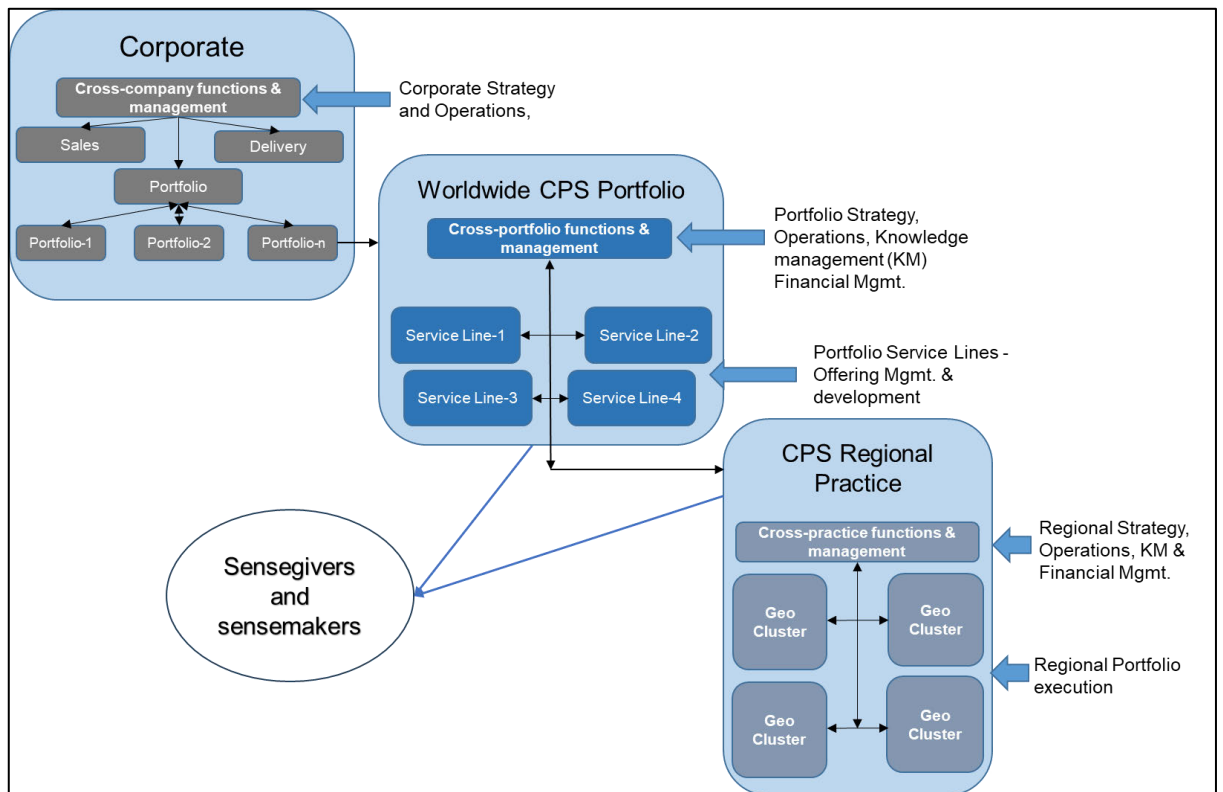
Figure 1-2: Organizational structure illustrating the positioning of study portfolio sensegivers and sensemakers

This proposed research then deals directly with the CPS practitioners, how they strategize, i.e., how they deploy and sustain market facing service-offers; how they use the tools of strategy, such as the narratives and texts used to convey strategies; and how those CPS practitioners directly responsible for offerings, Portfolio leaders and Offering Managers (OMs), enact strategy, i.e., the conversations, interactions and the surrounding tensions that impact these OM conversations and their praxis.

1.4 The site

The CPS business unit that became the site of this research was situated in an extraordinarily unsettled, evolutionary environment. In 2008 the portfolio's parent company (itself a 120,000+ employee company) was acquired by another large American head-quartered technology company of equal size and scale (the merged entity is referred to as AcquireCo, Figure 1-3) and was then subject to a long period of integration. Another major change event then occurred in late 2015 when AcquireCo was split into two Fortune 50 organizations (referred to as RemainCo and SplitCo, Figure 1-3).
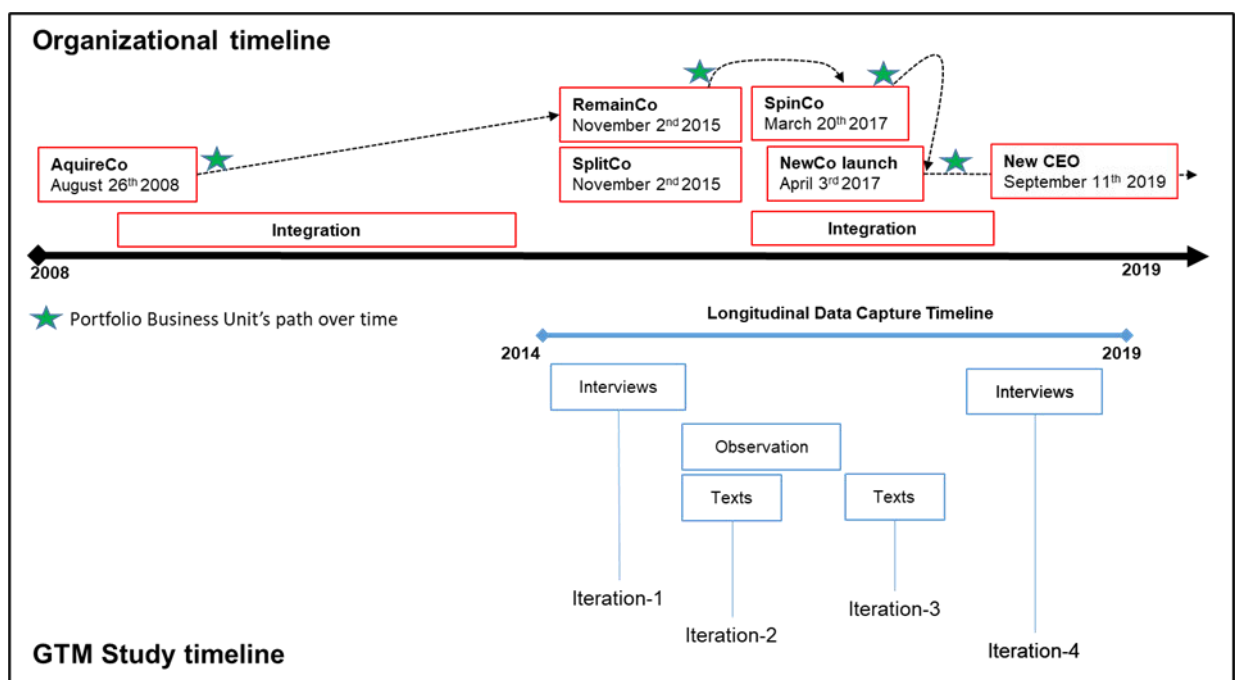
Figure 1-3: Macro organization context and timeline

Early 2017 saw yet another event where the company division that sold and delivered IT services to the enterprise market and where the studied Portfolio business unit (CPS) was homed, was spun out of RemainCo (Figure 1-3) to form a temporary company called SpinCo (Figure 1-3). A month later in April 2017 SpinCo was then merged with an external competitive organization to form a completely new trading company (referred to as NewCo, Figure 1-3).

At each stage of the corporate mergers and acquisitions process, the Portfolio business unit represented by the green star (*) in Figure 1-3, that formed the site of this research survived

the upheavals relatively unscathed save for business unit renaming from Workload and Cloud to Cloud and Platform Services, cost optimization initiatives and one Senior Vice President leadership change early in 2015 (prior to the commencement of this study).

This research was conducted as a longitudinal study during the period October 2014 through to September 2019 within the context of this hyper-organizational upheaval. However, the CPS business unit studied remained constant in responsibility and scope during this macro-organizational evolution. Importantly CPS also maintained the same Senior Vice President leader throughout the primary organization's evolution with the predominant strategic direction remaining consistent, allowing continuity of access to the conversational partners and primary texts throughout.

1.5 Purpose of the study

The purpose of this study was to uncover understanding about why the conveyance of strategy is problematic in practice, by understanding how tensions of continuity and change manifest and are dealt with at the micro level during the conveyance process. Further, understanding how tensions affect the conveyance process between the SGs (Offering Management Leaders as sensegivers) and SMs (Offering Managers as sensemakers) and how are those tensions are experienced would be of interest. This qualitative interpretative study utilized a combination of interviews, observation, and primary texts, and follows a Constructionist grounded-theory design (Charmaz, 2006) to guide the collecting and coding of the gathered data allowing categories to emerge and theory to be generated. In accordance with a grounded theory methodology (GTM), data were collected by the following across four (4) iterations (summarized Table 1-1):

- 16 conversational events with SGs, 7 conversational events with SMs, plus one group conversation with 5 SMs in a forum occurred:

    o Interviewing of 7 unique Portfolio Offering Leaders as sensegivers,

    o Interviewing of 10 unique Portfolio Offering Managers as sensemakers,

- Performing Insider observation of a 3-day strategy conveyance meeting and the interactions between SGs and SMs,

- Analyzing 4 practitioner selected primary strategy conveyance texts,

- Conducting follow up (member-checking) discussions with both SGs and SMs to gain feedback on interpretation and findings,

- Conducting constant comparison during analysis of the data, and,

- Letting the data drive the process of coding, generation of categories and theory with the expectation of generating new knowledge on how tensions affect the conveyance of strategy via narratives and texts.

Throughout the period of my role within the organization I was also involved in informal conversations with all the practitioners, so the SMs will have influenced my thinking as an SG and my interactions with other SGs over the whole period of the study. These interactions, captured in personal notes and grounded theory memos, worked towards offsetting the imbalance in my SG perspective and recognizes my legitimate insider role in this study.

	Iteration-1	Iteration-2	Iteration-3	Iteration-4a, 4b
Time period	Sept2014-Mar2015	June2015-Oct2016	Jan2017-May2018	Sept2018-Sept2019
Who or what	5xSGs	Strategy conveyance process	4xStrategy texts	4a-5xSGs and 4b-5xSMs
Activity / Mechanism	4xVirtual meetings and 1xFace to Face meeting, all audio recorded. Member-checking post transcription, coding, and analysis	Attendance at a 3-day offsite Face to Face Strategy session with 30+ attendees	Primary texts selected by email poll of 30+ CPS Portfolio Offering Mgmt. practitioners	10 Virtual meetings of 1 hour duration and audio recorded. Member-checking post transcription, coding, and analysis
Duration	Interviews: 1 hour duration			Interviews: 1 hour duration

Table 1-1: Summary of data collection events

1.5.1 Connecting the data gathering iterations over time

Given the evolution of the organization over time, the four iterations of data gathering and the spread of CP conversation events it is worth explaining how these data gathering events and conversations remained connected.

First although the organization went through dramatic evolution from 2008-2019, during the time this study was conducted (2014-2019), the Senior Vice President responsible for the CPS business unit took the helm in autumn 2014 and then remained in place as did I (as lead CPS strategist) and many of the sensegiving portfolio leaders through 2019. Second, the macro environment, during the time of this study, for IT Service Providers continued to focus on the rise of 'Cloud'[4] and so the over-arching portfolio strategy remained stable (with a focus on 'moving to the cloud') coupled with the drive for growth while sustaining the existing offerings and the revenue they generated.

Third, I conducted the contextualizing study (see sub-section 1.4.2.) during 2014 to hone the nascent research question and validate the research design. Fourth, the point in time I polled the Portfolio practitioners in relation to the selection of primary texts to analyse and the observation of the 3-day Strategy event both occurred during the SpinCo/NewCo timescale allowing the broadest set of texts and perspectives to be considered. Finally, as SGs and SMs changed roles or left the company all together, I actively sought out additional SGs and SMs to maintain a balanced coverage of CPS conversational partners to converse with, gain insights from and validate my findings.

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[4] "Cloud computing is a term used with increasing frequency in the past few years, as its popularity in business continues to grow. Essentially, it is technology that allows a business to store its servers and data off site in secure data centres which can then be accessed by users through the internet. This adaptation has spread across most industries and accountancy is no exception.

Industry analysts IDC stated that public IT cloud services revenue reached approximately $100 billion in 2016, with a prediction that the market will grow to over $200 billion in 2020 — almost seven times the rate of overall IT market growth [1]. Clearly, investment in cloud is displacing investment in on premise IT at an aggressive rate. In a follow-up survey [2] this trend was reconfirmed: 78% of companies were already using public or private cloud, and their usage is increasing; 62% expect that by 2019, more than half of their IT capabilities will be delivered through some form of cloud service. What are the driving forces behind the phenomenal growth? In general terms, the cloud is allowing companies to improve customer experience, increase productivity, lower cost, and aid in revenue generation by allowing a quicker time to market. Specifically, there are a number of key cross-industry global trends that are driving cloud adaptation." Source: EY Ireland: The rise and rise of Cloud Computing | EY Ireland. Accessed 20th November 2022.

1.5.2 The contextualizing study

The original research aim for the contextualizing study was to enter the field and establish how the sensegivers conveyed portfolio strategy and if tensions were present in the conveyance practices.

A nine month qualitative contextualizing study was conducted during March-November 2014 in order to gain a more complete contextual picture of the practices of strategy conveyance used within the CPS business unit i.e. practices used to convey strategic direction along with exposure to some of the tensions that might affect the sensegiving/sensemaking process of the Portfolio/Offering Management practitioners involved, paying particular attention to the importance of middle managers in the process of sensemaking and facilitation through sensegiving activities (Filstad, 2014).

Five study participants (Conversation Partners (CPs) 1-5) were draw from a set of portfolio leaders i.e., purposeful sampling of middle-managers, to gather both a contextual backdrop of the work that goes on within CPS, but also to explore the practices of strategy conveyance from a sensegiving practitioner's perspective initially.

Until I started the research, I had not considered the role of tensions in the sensegiving sensemaking process, but the early grounded theory method coding, along with some reading of the literature, brought them clearly to the fore. By also mapping the contextualizing study data via direct quotations and metaphors against the categories of Organizational Tensions defined by Smith and Lewis (2011) a brief glimpse of how each sensegiver talked about strategy conveyance and tensions became clearer.

This brought to mind that a practitioner's sensegiving can affect their own sensemaking of certain tensional issues (Maitlis and Lawrence, 2007), e.g., "*bridging that gap*" [CP3-SG, Interview-1] by articulating a future state and mapping current state to that future through a series of actions they told of how the need to create, while also sustaining existing offerings, became manageable.

Additionally an understanding of whether the sensemakers or sensegivers-as-sensemakers, were accepting of those tensions also became apparent, e.g., "*concrete kites*" [CP5-SG, Interview-1] where one conversational partner related an example of an over-engineered offering that failed to 'take off' and was then acknowledged, chalked up to experience and moved on from; or instead sought ways to resolve tensions e.g., "*game of bring me a rock*" [CP2-SG Interview-1] which refers to a process of negotiation to reach an agreed understanding suitable for further progress to occur.

The contextualizing study analysis also highlighted differences in the way practices were used in relation to i) Information sharing (Initial Codes: CASCADING; SHARING; COMMUNICATING) and ii) the conveyance for meaning and/or understanding (Initial Codes: ALIGNING; DIRECTING, SUPPORTING, UNDERSTANDING).

The contextualizing study resulted in a rich source of data that I reflected upon. It was at this stage that the bridge metaphor started to emerge as a way of conceptualising the interactions between sensemakers and sensegivers over time. I sought out further literature to help refine the full study research design and research questions, and importantly, showed the potential for uncovering knowledge academically interesting on which to build theory. As Alvesson and Karreman (2007, p. 1266) suggest in relation to theory development, "It is the unanticipated and the unexpected – the things that puzzle the researcher – that are of particular interest".

1.5.3 Research questions and research objectives

Based on the purpose of this study discussed in section 1.4 and the insights gained from the contextualizing study (sub-section 1.4.2), one primary research question (1), and two supplemental questions (2 and 3) formed. The questions are:

1. How do tensions influence IT strategy conveyance between leaders as sensegivers and managers as sensemakers?

2. How, and when, are tensions conveyed through the medium of narratives and texts?

3. How are tensions experienced and become salient for sensegiving leaders and sensemaking managers?

Correspondingly the following research objectives (RO) were defined to guide answering the research questions and clarify the outputs to be delivered by this study:

- RO1: To explore what happens around the narratives and texts in terms of the rhythm and process of communication and, what the narratives and texts contain in terms of metaphors.

- RO2: To uncover how the strategy conveyance narratives and texts express tensions to better understand how those tensions affect the conveyance process.

- RO3: Explain where strategy conveyance tensions appear and how and why they become salient to portfolio development practitioners.

Achieving these research objectives will shed light on the micro practices of strategy conveyance adding to the body of knowledge in the SAP arena.

1.6 Research strategy

In summary the strategy taken for this study was one of constructionist grounded theory method (Charmaz, 2006) with the aim of building theory as at the onset of this study in 2014 there weren't many process and longitudinal studies of sensemaking, paradox and SAP. This is discussed in detail within Chapter-3. The study was longitudinal in nature with qualitative data gathering, via conversational interviews with both SGs and SMs, observation with field notes, primary strategy conveyance texts, and interpretative analysis methods (GTM coding, Genre analysis, GTM memoing) employed; this is discussed fully in Chapter-4.

1.7 Thesis structure

The thesis is structured to present the study context and its findings in a logical fashion. The intention is two-fold, 1) to guide the reader through the studies evolution towards the constructed grounded theory supported using the metaphor of a suspension bridge, and 2) to enable the reader to recognise the relevance of the research and its application to both the field of Strategy-as-Practice and the world of the IT Services Portfolio practitioner.

The structure of the thesis and the relationship and dependencies between each chapter is represented in Figure 1-4.

Chapter 1: Introduction to thesis		
Context	**Design/Execution**	**Discussion**
Chapter 2: Sensitizing literature review	Chapter 3: Research design	Chapter 5: Findings
	Chapter 4: GTM applied • Execution of GTM • Research questions reminder • Data gathering approach • Sampling • Data management and ethical approvals • Data gathering and analysis iterations • GTM coding, memoing and diagramming	Chapter 6: Discussion
Chapter 7: Contributions and thesis conclusions		

Figure 1-4: Visual thesis structure

Figure 1-4 illustrates how each aspect of this thesis addresses this research. Each of the following chapters are explained in overview in Table 1-2.

Chapter number	Chapter description
Chapter 2	Early sensitizing review of extant literature in the domains of Strategy as Practice, Narratives and Texts, Organizational Paradox, and Sensemaking /Sensegiving.
Chapter 3	Explanation of the research design employed (GTM), the philosophical stance of the researcher and a discussion on my privileged insider researcher status.
Chapter 4	Explanation of the data gathering methods utilized, the iterations of data gathering and analysis, and the GTM coding paradigm applied.
Chapter 5	Presentation and initial discussion of the three emerging theoretical study findings, coupled with periodic revisits to the literature to support the

	abductive interpretation process (Metaphors, Organizational Space, and Time).
Chapter 6	Presents the theoretical discussion of the resultant grounded theory, the conceptual framework, and associated propositions.
Chapter 7	Discusses of the contributions to theory and practice, and then covers the topics of quality, study limitations, future research, reflections of the doctoral journey and the thesis conclusion.

Table 1-2: Structure of thesis by chapter

1.8 Summary - Chapter 1

This chapter explains the context for the study, the site where the research took place and its unsettled evolution through time while also introducing:

- the contextual strategy-as-practice backdrop of the research,

- the visual suspension bridge metaphor applied as a grounding frame,

- indicated my personal interest in the research,

- the analytical methodology utilized, and,

- indicated what the study set out to achieve (its purpose), and how.

Chapter 2 next discusses the sensitizing literature review.

2   Literature review

"As knowledge increases, wonder deepens." - Charles Morgan.

2.1   Rationale and structure of this chapter

Historically the aim of this research was prompted by my reading of Linda Rouleau's work on the micro-practices of sensemaking and sensegiving related to how middle managers interpreted and sold change every day (Rouleau, 2005). Considering the CPS portfolio practitioners as middle managers and strategists (Jarzabkowski and Spee, 2009), who are involved in championing, implementing, facilitating, and synthesizing information (Floyd and Wooldridge, 2016). Examining what happens during the conveyance of IT portfolio strategies broadens our understanding of the strategizing/organizing strategy work those middle manager practitioners do (Whittington *et al.*, 2006) is therefore important.

Further, exploring what swirling tensions are in play and how the use of narratives and texts ('suspension-bridge cables') help or hinder the sensegiving/sensemaking conversations that occur through the strategy conveyance process increases knowledge about the process of strategizing.

An initial contextualizing investigation conducted at the beginning of this study began to establish how the sensegivers conveyed portfolio strategies and ascertained that tensions were present in the portfolio strategy conveyance practices.

The outcome of the contextualizing investigation evolved the research aim to focus on exploring the potential connections between the SAP related practices employed during the conveyance of portfolio strategy (via narratives and texts) and the organizational tensions that surface during the evolving strategy conveyance process over time.

Three research objectives resulted:

- RO1: To explore what happens around the narratives and texts in terms of the rhythm and process of communication and, what the narratives and texts contain in terms of metaphors.

- RO2: To uncover how the strategy conveyance narratives and texts express tensions to better understand how those tensions affect the conveyance practices.

- RO3: Explain where strategy conveyance tensions appear and how and why they become salient to portfolio development practitioners.

Given the debated nature of conducting a literature review prior to entering the field of a study using GTM as methodology (section 2.2), the early-stage literature review (section 2.3) began by considering four academic domains as early sensitizing guides only: Strategy-as-Practice as the boundary/scope, Narratives and Texts (as research lens), Sensemaking/Sensegiving as the process of social construction, and Tensions that surface during the conveyance process which may get in the way of sensegiving/sensemaking. The domains of Metaphors, Organizational Space, and Time became relevant during the cycles of data analysis and form the later-stage literature review (sub-sections 5.2.3.3, 5.3.6, and 5.4.4 respectively).

The remainder of this chapter is organized using the following structure:

- Section 2.2: Discusses the use of a literature review in a GTM study,

- Section 2.3: Early-stage literature review:

  - Sub-section 2.3.1 Strategy as Practice; a review of the literature concerned with SAP as boundary/scope control of this research,

  - Sub-section 2.3.2: Narratives and Texts; a review of the literature related to narratives and texts which act as the conveyance vehicles of portfolio strategy,

  - Sub-section 2.3.3: Sensemaking, Sensegiving, and Sensebreaking; a review of the literature concerned with the SG processes of influencing and SM processes of understanding respectively,

  - Sub-section 2.3.4: Organizational Paradox; a review of the literature concerned with how tensions impact and influence organizing practices.

- Section 2.4: Summary of Chapter 2.

2.2 The use of a literature review within a GTM study

In grounded theory methodology the use of the literature review is contested.

In their seminal work on GTM, Glaser and Strauss (1967, p. 253) accept that "no sociologist can possibly erase from his mind all the theory he knows before he begins his research.". Subsequently, Glaser (1992) argued that researchers should avoid engaging with extant

literature but rather let the data guide them, as there is no need to perform a literature review in the substantive area of study which could cloud the researcher's ability to generate categories.

Later GTM scholars (Charmaz, 2006; Bryant and Charmaz, 2011; Urquhart, 2013) consider that although deferring the formal literature review and synthesis should come after the data, entering the field without some theoretical sensitivity is a naïve expectation for seasoned researchers. Theoretical sensitivity is "crucial to the application of GTM" (Bryant and Charmaz, 2011, p. 17) because of the need to entertain alternative theoretical possibilities and make theoretical comparisons. However, as Bryant and Charmaz (2011, p. 17) point out, "the advice about postponing exploration of the literature usually emanates from experienced researchers" who already have a massive knowledge of literature, topics and concepts to draw on. The novice researcher can be left in "confused awe" and has to start somewhere to develop theoretical sensitivity (Bryant and Charmaz, 2011, p. 20).

As Urquhart (2013, p. 29) states "The idea that the GTM researcher is a 'blank slate' who launches into data collection without first looking at the literature is a particularly pervasive misconception (McCallin 2003; Andrew 2006).", ultimately the researcher should avoid influencing the coding of the data (Urquhart, 2013).

Initially it is important to note that the early-stage literature review in grounded theory methodology is designed to sensitize the researcher to the problem area, rather than direct or guide the investigation. Even then there are debates around how much academic literature should be covered.

Given my nascent researcher status, I decided to identify some broad theoretical domains to sensitize myself to potential conceptual influences on the problem. What follows is a contextualizing entrée to the study in section 2.3.

2.3 Early-stage literature review

2.3.1 Strategy-as-Practice

Strategy-as-Practice (SAP), identified as the Practices, Praxis ("the work of strategy making" (Whittington, 2007, p. 1598)) and Practitioners under study, acts as the boundary/scope control of this research. In looking at the practices of conveying strategies, through the texts created, the narratives built, and the conversations engaged in, and through the eyes of

practitioners, as this research does, it should reflect actual praxis with some degree of accuracy as Jarzabkowski and Whittington (2009) call for.

Put in context of this research, the doing of strategy is the daily work of the Offering Managers e.g., meetings, competitive analysis, planning, offering definition and development, reporting on status/progress etc.) forms the praxis. The members of the Portfolio Management group, which includes the Offering Managers, are the practitioners, i.e., those using the practices and engaging in the strategy conveyance process.

Back in 2014 when I began this research journey[5], the domain of SAP was still considered relatively new as a research field by some (Golsorkhi *et al.*, 2010; Vaara and Whittington, 2012; Brown and Thompson, 2013) though authors such as Whittington did begin to write about the need to understand further the practices and praxis in strategy-making back in 1996 (Whittington, 1996). Now writing in 2023, the SAP domain is more than 20 years old, much more populated and fragmented and in need of connections to other domains to aid in consolidation (Kohtamäki *et al.*, 2022). The more recent SAP arguments and insights relevant for this research are dealt with in Chapter 6: Discussion.

By 2015, the SAP field was in its second decade (Rouleau, 2013), with SAP considered an alternative to traditional strategy research in that it focuses on in-depth analysis of the 'doing' of strategy (Golsorkhi *et al.*, 2010), particularly as it relates to the practitioners[6], practices[7], and praxis of strategy enactment[8] often referred to as strategizing (Whittington, 1996; Whittington, 2006; Jarzabkowski and Whittington, 2009).

SAP shares many commonalities with the Strategy Process and Micro-Foundations approaches to strategy, allowing SAP to both heighten the explicit links between the micro- and macro-level and extend the analysis of social practices much further than is portrayed in current research (Vaara and Whittington 2012).

Additionally SAP can be understood as a complementary approach to the resource-based view (RBV) and dynamic capabilities of mainstream strategy research (Jarzabkowski, 2005), with Jarzabkowski (2005) further suggesting that SAP should be considered instead as an activity-based view of strategy.

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[5] The elapsed time to conduct this study was due to the intensity of my workload through the organizational evolution and the resulting impact that had on my own health which delayed the write up of this study findings.
[6] those who do the actual work of making, shaping, and executing strategy.
[7] the routinized types of behaviours drawn upon in the concrete doing of strategy.
[8] the concrete, situated doing of strategy.

Jarzabkowski and Whittington (2009) highlight that the use of the SAP approach (i.e., concerned with explanatory theory, attempting to reflect actual practice with some degree of accuracy) combines both practice and theory resulting in making practice the direct subject of the research to better understand the 'doing' of strategizing.

By understanding the key evolutionary contributions to the SAP research agenda above, a sense emerges of the pivotal role of organizational and wider social practices in strategy-making, leading this research to initially adopt the following definition of Strategy-as-Practice: "It focuses on the micro-level social activities, processes and practices that characterize organizational strategy and strategizing." (Golsorkhi *et al.*, 2010, p. 1). With the advancement of the SAP domain however, and reflecting back, the definition of Strategy-as-Practice most pertinent for this study is: "strategy is fundamentally 'something that people do' (Jarzabkowski and Spee, 2009; Whittington, 2006)" (Kohtamäki *et al.*, 2022, p. 211).

If strategy is something people do, focusing on the practice of conveying strategies across levels, in fast moving organizations would give greater insight into how micro level practices shape strategy evolution. To achieve this requires the ability to observe the intersection between actions, behaviours and tensions and the predominant practices (Golsorkhi *et al.*, 2010).

The SAP domain views strategizing as not just an exclusive act by top managers but by multiple practitioners at many levels within and across an organization (Rouleau, 2013), and, that the definition and enactment of strategy and the linkages between strategy practices is a direct result of the routines, interactions and everyday conversations of those practitioner participants.

If the intersection or nexus of praxis, practices and practitioners is the 'locational occurrence' of strategizing i.e., where strategizing happens (Jarzabkowski, Balogun and Seidl, 2007), Figure 2-1, focusing on the relationship between the intersections A, B, and C (Figure 2-1) during the conveyance of strategy is important.
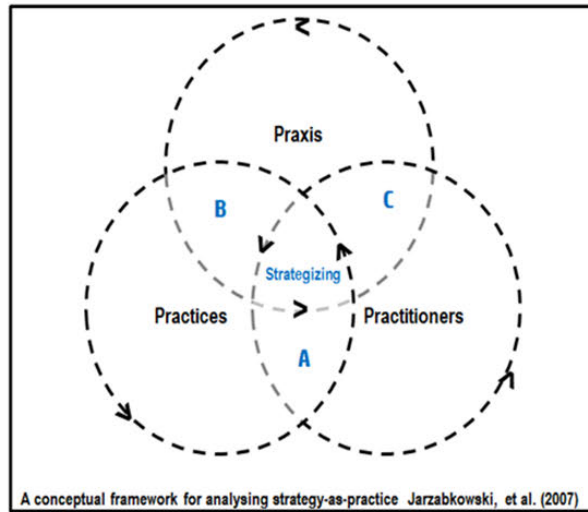
A conceptual framework for analysing strategy-as-practice Jarzabkowski, et al. (2007)

Practitioners: "Practitioners are strategy's actors, the strategists who both perform this activity and carry its practices.", and "strategy practitioners are those who do the work of making, shaping and executing strategies." (Whittington, 2006, p. 619). Within this study, the practitioners referred to, are those organizational actors of the Portfolio group that are tasked with designing, developing, and releasing to market the service offerings of the study organization.

Practices: Refers to "shared routines of behaviour, including traditions, norms and procedures for thinking, acting and using 'things', and there are strategy practices that practitioners typically draw on in their praxis" (Whittington, 2006, p. 619). Within this study, practices refer to the shared IT portfolio management routines and the use of things such as meetings with defined agendas, e.g., SteerCos, Extended Leaders Calls, and Microsoft PowerPoint presentations with defined content, e.g., Plan of Record, Strategic Business Plan.

Praxis: Refers to "actual activity, what people do in practice.", and what "practitioners actually do is strategy praxis – all the various activities involved in the deliberate formulation and implementation of strategy." (Whittington, 2006, p. 619). Within this study, those activities conducted by the portfolio practitioners to enact the go to market service offering strategy of the organization.

Strategizing: Defined by Vaara and Whittington (2012, p. 286) as "strategy work ("strategizing")". In this study 'strategizing' refers to the work of the collective Portfolio Management team, including the Offering Managers.

Figure 2-1: Conceptual framework for analysing SAP

Focusing further on the relationships between the intersections (Whittington, 2006) of praxis, practices & practitioners framework during the conveyance of strategies aims to extend our understanding on human interactions during strategizing. These relationships are important as whatever the practices, "people's purposes, enactment of roles and meanings they construct within their linguistic communities are fundamental both to how they identify themselves and their praxis" (Golsorkhi *et al.*, 2010, p. 247). This will affect their sensemaking, and sensebreaking potential, and whether it is easy for them to recognise the tensions of the conveyance process.

Focusing on practices as a set of tools under-pinned by the theoretical influences of communication and language theories (Rouleau, 2013), this study proposes that micro-practices and the daily actions of OM practitioners are rich with material artefacts that have the ability to both convey or confuse meaning.

While strategy tools in themselves are not the same as strategy, they are viewed as part of the wider activities of strategizing, e.g., used as an aid in idea generation and strategy discussions. However, they may also have a constraining effect during episodes of strategy conveyance as, although the tools may provide a common language for strategy conversations, shared meaning may not result (Spee and Jarzabkowski, 2009).

If we also consider that the material aspects of strategizing link SAP and the social interactions around them (Dameron, Le and LeBaron, 2015) this falls within the realm of sociomateriality in the study of organizations (Moura and Bispo, 2020). Potentially organizational studies have "overlooked the ways in which organizing is bound up with material forms and consideration through which humans act and interact" (Orlikowski, 2007, p. 1435). On later reflection this answers the call for further studies that increase our knowledge of the current disconnects between sociomateriality and discourse, which Kohtamäki *et al.* (2022) suggest will aid the future evolution of SAP.

2.3.2 Narratives and Texts

Narratives and texts[9], sometimes referred to as oral and written stories[10] (Peirano-Vejo and Stablein, 2009), are said to have the property to be "flexible carriers of meaning" (Peirano-Vejo and Stablein, 2009, p. 445) i.e. vehicles for conveyance. This makes them an ideal research lens for examining the sensegiving and sensemaking of practitioners who engage daily with narratives and texts that initiate, build, reinforce, threaten, and tear down their daily organizational praxis and practices. With tearing-down referring to "the destruction or breaking down of meaning" known as sensebreaking (Pratt, 2000, p. 464).

Vaara, Sonenshein and Boje (2016, p. 496) define narratives as "temporal, discursive constructions that provide a means for individual, social, and organizational sensemaking and sensegiving". They maintain that narratives "can also include and relate to other forms of communication and modes (especially visual and audio)" (Vaara, Sonenshein and Boje, 2016, p. 499). Other authors go further and do not distinguish between the definition of a narrative or a story stating that the terms narratives and stories refer to "thematic sequenced accounts that convey meaning from implied author to implied reader." (Barry and Elmes, 1997, p. 431).

These narratives and texts act as "cultural mechanisms for translating ideas across the organization" (Bartel and Garud, 2009, p. 107) supporting social interactions that then become embedded in the OM's daily praxis and practices while pursuing the organizational objectives of revenue sustainment (via existing market offerings) and growth (through the launch into market of new offerings).

Many strategizing narratives (defined as a "set of events and the contextual details surrounding their occurrence" (Bartel and Garud, 2009, p. 108)) and texts strategizing practitioners deal with are likely aimed at growth building for the future, i.e., innovation related narratives (both oral and written). While some of the strategizing practitioners' roles and praxis are also often related to what exists now in their daily management practices.

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[9] Text is defined as "definite forms of words, numbers or images that exist in a materially replicable form." (Smith (2001)) cited Cooren, F. (2004) 'Textual Agency: How Texts Do Things in Organizational Settings', *Organization,* 11(3), pp. 373-393.

[10] Noting the "terms narrative, account and story often used interchangeably" Vaara, E., Sonenshein, S. and Boje, D. (2016) 'Narratives as Sources of Stability and Change in Organizations: Approaches and Directions for Future Research', *The Academy of Management annals,* 10(1), pp. 495-560..

These texts should sit at the center of the SAP Practitioner-Practices-Praxis intersection (Fenton and Langley, 2011). Narratives and texts are the 'bridge supporting cables' employed in the conversations that occur when practitioners try to convey (as sensegivers), receive (as sensemakers), interpret, negotiate, and understand (as both sensegivers and sensemakers).

The sensegiving-sensemaking process involves interpretation and reflection at multiple levels, and by "understanding that sensemaking involves processes of narrativization (narrative-making) [that] permits nuanced investigation" (Brown, Stacey and Nandhakumar, 2008). exploring via a lens of narratives and texts (i.e., applying a narratological approach) insights related to practitioner understanding during strategizing may become clearer.

If the narrative nature of strategy texts highlights the discursive and social nature of the practices of strategizing (Barry and Elmes, 1997), and narratives/texts enable practitioners to share information and/or generate new meaning and application for their work actions (Bartel and Garud, 2009) while "thematic sequenced accounts that convey meaning from implied author to implied reader" (Barry and Elmes, 1997, p. 431) occurs, it may also follow that each practitioner will make different interpretations resulting in differing understanding of the same conveyed narrative or text.

Even if practitioners reach a shared sense and are strategically motivated, they may still perform their own personal interpretation of conveyed strategies i.e., "Social actors tell stories of and for themselves in order 'to make things rationally accountable to themselves'" (Weick, 1993, p. 635) cited Brown, Stacey and Nandhakumar (2008), especially if those stories are contextually and temporally bound Barry and Elmes (1997).

One way in which collective sensemaking of our social world is enabled is through "jointly negotiated narratives" (Currie and Brown, 2003, p. 564), with those narratives being significant vehicles for expression as well as how practices are legitimated especially during periods of organizational change. Ultimately, sensegiving and sensemaking narratives are not just explanations and self-insight but mechanisms of communication and persuasion (Brown, Stacey and Nandhakumar, 2008).

Fenton and Langley (2011, p. 1176) suggestion that "narrative elements such as sequence, character and plot expressed in talk and text simultaneously reflect and structure people's understanding of what they are doing" and what an organization's strategy is or will become. Focusing on the sensegiving-sensemaking strategy conveyance process over time and the elements of sequence, becoming and doing will thus be important.

Going further than narratives alone, Fenton and Langley (2011) suggest that texts are critical to sensemaking within organizations as strategy praxis often results in written texts (e.g., strategic business plans) and call for Whittington's tripartite framework of Praxis, Practices and Practitioners be extended to encompass Texts (Figure 2-2). Additionally, Vaara, Sonenshein and Boje (2016, p. 528) talking about the process of organizational identity during stability and change state that "Not only verbal or written texts, but also visual representations and material artifacts are likely to play an important role in these processes, and their analysis remains a key challenge for future research".

Integrating narratives into strategy as practice, Fenton and Langley (2011)
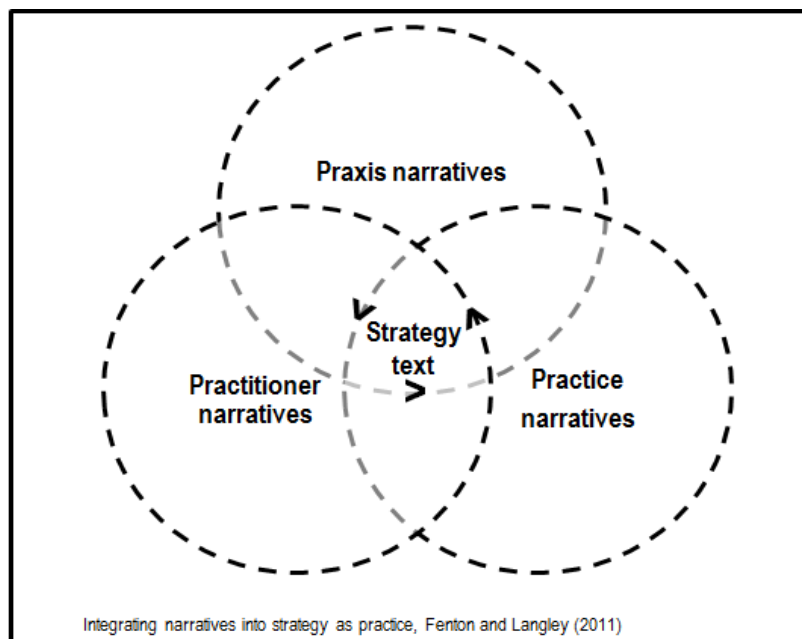
Figure 2-2: The extension of SAP tripartite framework (Praxis, Practices, Practitioners) with the addition of narratives and texts

If much of the doing of strategy in organizations is conducted in the form of talk, texts, and conversations (Fenton and Langley, 2011), applying a narrative turn (Barry and Elmes, 1997) should make for a richer exploration of the practices of strategy conveyance, and allow for bridging between the work conducted within the SAP realm and other organizational research domains. By using the narrative approach there is potential to connect the daily micro-activities of practitioners with institutionalized organizational strategy practices (Fenton and Langley, 2011).

We should also ask ourselves whether texts have agency. Cooren (2004, p. 373) suggests that it "is possible to ascribe to texts the capacity for doing something" and goes on to

explore the different types of actions that texts can be said to be performing. Cooren's premise is that texts, though not foundational, participate like other agents (e.g., humans) in the constitution of daily organizational life, experience, and action. He laments that very few studies focus specifically on the agency of organizational texts with research so far failing to recognize that texts, on their own, can make a daily difference in an organizational context.

One might also suggest that strategy texts, in whatever form, oral, PowerPoint, policy document etc., are conveyed in order to promote action, i.e., they are intended to be a mechanism that promotes the act of transformation and change. Organizations enact not only through human action, so texts can be said to invite action and strategy texts in particular act on behalf of the organization in its continuous drive to evolve competitively.

Narratives around practices, practitioners and praxis which surround the texts (Fenton and Langley, 2011), Figure 2-2, might be the sources of some of the texts, however, the narratives "are filtered, edited and re-sorted based on hindsight" (Brown, Stacey and Nandhakumar, 2008, p. 1039). Potentially narratives alter faster than the texts and may therefore be being interpreted differently as the strategizing process proceeds. I.e., this possible faster alteration of sensegiving texts may become out of sync with the way in which sensemakers thinking is progressing and their praxis is changing. Tensions may arise as although the narratives and texts crystallise some strategic specifics, ambiguity can be embedded in for example in strategy texts (Abdallah and Langley, 2014), and those same narratives and texts also need to remain flexible enough to accommodate reality on the ground.

The durability of the strategy conveyance texts over the evolving timeline of this study may also be important and could potentially highlight how any changes punctuate the narrative over time. As Anderson (2004, p. 145) says, "Unlike spoken conversation, written texts are capable of being transported to other times and places, enabling organizations to retain meanings beyond the immediate setting. Written texts (policies, memos, meeting minutes) are genres through which organizational action is played out and that provide the possibility for future action to be interpreted as the action of someone performing an organizational role.". Texts do have limits though, Cooren (2004) identifies that texts cannot boast, brag, or confess whereas human actors can exhibit these traits, and texts do not burst into life by some miraculous un-earthly act, texts are still created by human action and even over time and space are attached in some way to their creators, texts have a certain resistance (staying power) that humans do not.

Strategy documents may imply the required actions to practitioners, but they don't explicitly tell a practitioner exactly how to act. By recognizing what nonhumans do, e.g., texts, the divide between micro and macro practices of an organization is more closely linked and that "Created by human beings, these texts participate in the channeling of behaviours, constitute and stabilize organizational pathways, and broadcast information/orders." (Cooren, 2004, p. 388).

If narratives and texts are the 'tools' of strategy conveyance, and strategy texts are as Spee and Jarzabkowski (2011, pp. 1220, emphasis in original) suggest "negotiated through a cumulative cycle of talk and texts where "*Talk* is considered as any orally expressed discourse" and text "as any ideas or discourse expressed in writing", then sensemaking in strategizing is the way in which strategy practitioners understand, make meaning of and interpret those strategic narratives and texts within the context of the strategizing practices (Rouleau, 2005).

Given a faction of the SAP community has focused on the examination of sensemaking in strategizing (Balogun and Johnson, 2004; Rouleau, 2005; Balogun and Johnson, 2005; Golsorkhi *et al.*, 2010; Rouleau and Balogun, 2011), this literature review now turns to a discussion of sensemaking, sensegiving and sensebreaking.

2.3.3 Sensemaking, Sensegiving and Sensebreaking

Sensemaking (Weick, Sutcliffe and Obstfeld, 2005) and sensegiving (Gioia and Chittipeddi, 1991) are the strategy practitioners' processes for understanding and for influencing understanding respectively. In strategizing the sensegiving-sensemaking processes act as a mechanism for constructing the roadway to understanding between people with different responsibilities in the strategizing process. Sensebreaking, i.e., "the destruction or breaking down of meaning" known as sensebreaking (Pratt, 2000, p. 464), is a necessary addition to allow for the creative aspects of strategizing practices. Sensegiving, sensebreaking and sensemaking occur both individually and collectively (Maitlis and Christianson, 2014), at different paces, with the potential for time lags (Bromley, 2010) and gaps (Dervin, Foreman-Wernet and Lauterbach, 2003) to occur in the strategizing process.

The field of research surrounding sensemaking offers broad definitions such as; "Sensemaking is a generic phrase that refers to processes of interpretation and meaning production whereby individuals and groups interpret and reflect on phenomena" (Brown, Stacey and Nandhakumar, 2008, p. 1038), and "construction and development of a

framework that enables an understanding of experiences and of organization's reality" (Filstad, 2014, p. 6).

In SAP, the broad definition of sensemaking is refined to focus on managers practices (Rouleau, 2005; Rouleau and Balogun, 2011). It is also worth noting that sensegivers are still sensemakers in that they have to understand for themselves before they can influence others, but that as sensegivers their praxis is focused on influencing.

"Sensemaking has to do with the way managers understand, interpret, and create sense for themselves based on information surrounding strategic change. Sensegiving is concerned with those managers' attempts to influence the outcome, to communicate their thoughts about change to others, and to gain their support." (Rouleau, 2005, p. 1415).

Further, sensegiving is defined by Gioia and Chittipeddi (1991, p. 442) as both the "process of attempting to influence the sensemaking and meaning construction of others" and an "interpretative process", and is said to be used (importantly for this study) by middle managers to influence other actors actions towards a preferred organizational state (Balogun and Johnson, 2004). Ultimately, sensegiving is happening at the middle management level which puts those middle managers at a pivotal point in the organizational strategizing process.

Sensemakers practice however, is instead focused on understanding, interpreting, and creating sense for themselves (Rouleau, 2005), while both sensegivers and sensemakers have to engage with sensebreaking. Sensegivers will have engaged with the practice of sensebreaking before they can influence the sensemakers, and sensemakers engage with sensebreaking as they attempt to make sense (Pratt, 2000).

Maitlis and Christianson (2014, p. 57) suggest that "sensemaking enables the accomplishment of … key organizational processes" so action must also have a role in sensemaking. In that context, sensemaking is more than individual interpretation, with "active authoring of events and frameworks for understanding" (Maitlis and Christianson, 2014, p. 58) occurring, while sensegiving is seen as very much "sequential and reciprocal" (Hope, 2010, p. 197) when occurring as practices within ongoing organizational communication.

These sensemaking, sensegiving, and sensebreaking practices play a pivotal role in both the activities of organizations and their practitioners' daily praxis. However, academic agreement has yet to be reached in totality on what sensemaking theories (encompassing sensegiving and sensebreaking) include, how it is achieved and whether it is wholly an individual cognitive process or one that is more shared through the sensegiving/sensemaking dialectic

(Maitlis and Christianson, 2014), which itself is tensional in nature (see sub-section 2.3.4 for a discussion on tensions, contradictions, dialectics and paradox).

Maitlis and Christianson (2014, p. 59) go on to say that "sensemaking offers a useful theoretical construct" for academic research in many domains, e.g., organizational communication (Thøger Christensen and Cornelissen, 2011), strategic change, and innovation. The domain of SAP is no different and often draws on the construct of sensemaking/sensegiving to shed light on practitioner praxis, practices and daily actions aligned to organizational outcomes (Balogun and Johnson, 2004; Rouleau, 2005; Whittington, 2006; Rouleau and Balogun, 2011; Balogun *et al.*, 2014).

The area of strategic sensemaking is said to have evolved in two distinct directions, one in relation to articulating a general pattern to the different dimensions (e.g., processes such as information capture, meaning creation and action) of strategic change and the other (and to which this research study subscribes) regarding strategic sensemaking and the narrative turn (i.e., how managers make sense of the past, deal with the current and plan for the future), (Rouleau, 2005).

Rouleau (2005) also highlights that a review of the many case studies produced by researchers in this field provide a collective understanding of how sensemaking is socially constructed over time at a micro-level, though middle managers activity was neglected in the strategy literature back in 2005. However, once strategy was defined more by consequence than planning, middle manager actions became incorporated into the realm of SAP and regarded as strategic (Jarzabkowski, Kavas and Krull, 2021)).

The seminal author on organizational sensemaking (Weick, 2001) summarizes seven properties that effect a person's efforts to grasp and see their way through a situation (Table 2-1). Once sense is made by an individual via the sensemaking processes of enactment, confronting their environment, selection, and retention (Sandberg and Tsoukas, 2015), sustained interaction with other individuals can then occur over time. The result being that those individuals become organized. Sensemaking is perceived as a constructive practice that affects groups and cross group interaction because it is, "social, grounded on identity, narrative, and enactive." (Sandberg and Tsoukas, 2015, p. S8).

Many scholars (Wrzesniewski, Dutton and Debebe, 2003; Akgün *et al.*, 2012; Gioia and Thomas, 1996) build on Weick's properties (Table 2-1) of sensemaking by looking at the impact of organizational contexts in relation to the circumstances an organization finds themselves facing. These scholars explore the way meaningful understanding travels between individuals, groups and, how sensemaking rises to an organizational level through

the practices of intuiting, interpreting, integrating, and institutionalizing (Crossan, Lane and White, 1999). All of these factors are constitutive components of modern organizations and ultimately, the dynamics of the seven properties of sensemaking (Weick, 2001) connect the individual to organizational levels.

Properties	Description
Social context	Where sensemaking is said to be influenced by others in a social reality
Personal identity	A person's sense of who he or she is in a particular setting
Retrospect	The perceived world is the past world as things are visualized and seen before they are conceptualized
Salient cues	How people elaborate minute indicators into rich stories/narratives
On-going projects	Sensemaking is constrained not only by past events but also the speed with which those events flow into the past
Plausibility	Sensemaking as coherence, how the events credibly hang together
Enactment	By acting/performing actions an improved understanding of what one is up against forms). All of which may challenge or support an individual's ability to deal with the many tensions enacting strategy implies

Table 2-1: Weick's seven properties of individual sensemaking

Research in the Sensemaking domain has moved on somewhat (Sandberg and Tsoukas, 2015; Sandberg and Tsoukas, 2020) since Maitlis and Lawrence (2007) suggested that little was known about:

i)   the conditions (when, why, where) associated with sensegiving in organizations,

ii)   about the conditions that facilitate sensegiving by those organizational practitioners engaged with the act of conveying meaning for others to undertake their own sensemaking, and

iii) less still about the triggers and enablers of stakeholder.

While several SAP studies have explored strategizing using a sensemaking lens to explore the when, why and where of e.g., middle manager sensemaking during organizational restructuring (Balogun and Johnson, 2004), micro-practices of strategic sensemaking (Rouleau, 2005), middle managers and strategic sensemaking (Rouleau and Balogun, 2011), temporal work in strategy making (Kaplan and Orlikowski, 2013), strategic sensemaking through the use of visual representations of strategy (Garreau, Mouricou and Grimand, 2015) and, of shared emotions of managers during innovation process (Vuori and Huy, 2016), few SAP studies have focused specifically on the conveyance of IT services portfolio strategy. The arena of IT services portfolio strategy is highly social-material in form, fast paced and the distinctive context of go-to-market offering development between middle managers and their offering management staff.

It's also worth noting the pivotal role of middle managers (SGs within this study) in the process of sensemaking and facilitation through sensegiving activities (Filstad, 2014), particularly as sensegiving in the literature is perceived as a primary leadership function (Maitlis and Lawrence, 2007). Hence studying how managers give sense to others when conveying strategies is worthy of exploration.

The link between sensemaking and the practice of strategy is well discussed (Garreau, Mouricou and Grimand, 2015; Kohtamäki *et al.*, 2022), however tensions are not a focus. Even though author's like Paula Jarzabkowski straddle both the SAP (Jarzabkowski, Balogun and Seidl, 2007; Jarzabkowski and Spee, 2009; Jarzabkowski, Seidl and Balogun, 2022) and the Organizational Paradox fields (Jarzabkowski and Lê, 2017; Jarzabkowski, Lê and Bednarek, 2018), and although tensions are referred to implicitly as sensemaking exemplars (Kohtamäki *et al.*, 2022) in the SAP literature using words such as challenges, issues, contradict, problems, etc., (Table 2-2), the link between sensemaking/giving within the SAP domain and Organizational Paradox, remains under-explored.

SAP sensemaking examples	Sensemaking lens on the topic of:	Tensional language	Evidence
Balogun and Johnson (2004)	Organizational restructuring	Do this and that (Ambidexterity paradox)	"Individuals were to continue to do their old duties alongside their new duties" (p. 528)
(Balogun and Johnson, 2005)	Impact of change recipient sensemaking	Tensions, issues, and problems	"In response to the developing tensions" (p. 1582) "Other inter-divisional issues developed" (p. 1583) "The slow resolution of many of these problems…" (p. 1584)
(Rouleau, 2005)	Micro-practices of strategic sensemaking and sensegiving	Challenges	"The challenge was to convince them that…" (p. 1423)
(Kaplan, 2008)	Strategy making under uncertainty	Contradictions	"Anything that contradicts their view, they put through a micro-fine sieve." (p. 737)
(Rouleau and Balogun, 2011)	Sensemaking necessary for effective strategic conversations	Problems	"it was the job we talked about until he understood that we could look at the problem from another angle." (p. 960)
(Kaplan and Orlikowski, 2013)	Temporal work in strategy making	Tensions	"Participants sought ways to reduce or transcend the tensions associated with a breakdown" (p. 979)

(Garreau, Mouricou and Grimand, 2015)	Strategic sensemaking/giving practices using visual representations	Issues	"specific issues" (p. 698)
(Vuori and Huy, 2016)	Strategic innovation process	Problems and issues	"Different levels of differentiation and integration seem to lead to problems" (p. 11) "the TMs did indeed recognize this issue" (p. 22)

Table 2-2: Examples of recognition of 'tensions' within SAP Sensemaking articles

Fundamentally, competing tensions and demands occur within the practices of strategizing and during strategy conveyance. These tensions may well affect how both sensegiving and sensemaking occurs within organizations warranting further exploration.

This literature review now moves to introduce the field of organizational paradox and the topic of tensions.

2.3.4 Organizational Paradox

Organizational paradox is foundational to the initial research question. As Mumby (2014), cited Putnam, Fairhurst and Banghart (2016, p. 66) states "contradictions are an everyday occurrence in the workplace" so it is not surprising they are emerging as important for SAP researchers. Clearly it is a body of literature that conceptually will be part of theoretically sensitising myself to the problem area particularly as the context of continuity and change, involving exploration and exploitation. Additionally with the widening of scope of Organizational Paradox to a meta-theoretical level (Lewis and Smith, 2014) there is ready transferability for this study's interest.

Organizational life for practitioners is full of competing tensions (Smith, 2014) whether salient (Knight and Paroutis, 2017) or latent (Lewis and Smith, 2022), and organizations are essentially formed, and continue to exist, by how they respond to and manage often competing and persistent paradoxical demands (Gibson and Birkinshaw, 2004), such as the tensions that arise when an organization attempts to both explore and exploit (the paradox of Ambidexterity: exploration versus exploitation (March, 1991; Andriopoulos and Lewis, 2009). The tensions of exploitation and exploration are exceptionally pertinent to the IT services portfolio department as within this study as the group is tasked with both maintaining existing revenue streams from existing market offerings while simultaneously developing and launching new offerings for future growth.

Several definitions exist for organizational paradox, but they all have a common thread which suggests that "paradoxes denote tensions that coexist and persist over time, posing competing demands that require ongoing responses rather than one-time resolutions (Lewis, 2000)" cited (Smith, 2014, p. 1592). Schad *et al.* (2016, pp. 10, emphasis in original) define paradox as "*persistent contradiction between interdependent elements*" with two core characteristics, "contradiction and interdependence." that "engender its [the paradox's] persistence (Schad *et al.*, 2016, p. 11), while Smith (2014, p. 1592) defines Strategic Paradoxes as "contradictory, yet interrelated, demands embedded in an organization's goals".

At this point it is useful to note that the terms tensions, contradictions, paradox, dilemmas, and dialectics are only recently becoming more clearly defined and delineated academically (Smith and Lewis, 2011; Putnam, Fairhurst and Banghart, 2016; Lewis and Smith, 2022), Table 2-3.

Tensions	Tensions arise from the experience of apparently contradictory forces
Dilemmas	Dilemmas involve contradictory forces but the pull between them that are often treated as either/or alternatives or result in a compromise
Dialectics	Dialectics temporarily dissolve the tension through a both/and solution rooted in power differentials, which often creates another tension with a different contradictory force
Paradoxes	Paradoxes are dualities in which both poles are mutually interdependent, can never be dissolved, but must be held in dynamic equilibrium and deal with the forces as simultaneous priorities

Table 2-3: The differences between tensions, dilemmas, dialectics, and paradoxes

Ultimately "paradoxes are inherent in a system, created as boundaries delineate dualities and foster oppositions. Yet paradoxes are also latent and rendered salient through context (activated by change, plurality, and scarcity) and individual sensemaking." (Lewis and Smith, 2022).

The boundaries of paradox are defined by the core characteristics of contradictory and interdependent elements (Schad *et al.*, 2016) and these allow linkage to literatures on the topics of dialectics (Putnam, 2015) with the focus on power, conflict and change, and contradictions and dualities (Putnam, Fairhurst and Banghart, 2016) such as stability and change (Farjoun, 2010), and, materiality and discourse (Orlikowski and Scott, 2008).

With the many forms tensions can take e.g., pressures of economic uncertainty, wars, and globalization, tensions are likely to affect the way the practices of strategy practitioners convey and make sense for their praxis. "Organizations are rife with competing demands." Smith (2014, p. 1592), and practitioner preferences and/or priorities may sit on one side or the other of the dualities with the potential for those practitioners to not recognize the tension(s) or paradox(es) within a problem (Voronov and Yorks, 2015; Miron-Spektor *et al.*, 2017; Miron-Spektor *et al.*, 2018).

The pressures placed not just on managers but many within organizations can occur at multiple levels that are often nested (Jarzabkowski and Lê, 2017; Schrage and Rasche, 2022) and/or intertwined/knotted (Jarzabkowski *et al.*, 2022; Sheep, Fairhurst and Khazanchi, 2017), and are of varying types with strategic paradox said by Smith (2014) to be particularly consequential to an organization's existence.

Raisch *et al.* (2009) suggested that there are four 'pairs' of interrelated tensions that affect both organizations striving for continued success and the individuals who are members of these organizations, e.g., Differentiation versus Integration, Individual versus Organization, Internal versus External and Static versus Dynamic. Smith and Lewis (2011) attempted to create taxonomy of paradoxical activities in organizations that needed to be maintained in 'Dynamic Equilibrium'. This taxonomy involved six different sub paradoxes that arise from four core paradoxes of: Learning (using knowledge now and gaining knowledge for future), Organizing (the flexibility or stabilizing effects of processes that create the organization), Performing (planning for and working towards the achievement of goals, means and ends), and Belonging (the me/we identity and relationships of organizational actors), and that these tensions are fundamentally inherent within organizations.

The multiplicity of organizational paradoxes identified to date suggest the need for complex sensemaking and communicating in the strategizing process: for example such as the pressures of exploiting and exploring (March, 1991), control and collaboration (Sundaramurthy and Lewis, 2003), integrating globally while adapting locally (Marquis and Battilana, 2009), differentiating and integrating (Andriopoulos and Lewis, 2009), and considerations heightened by the Covid-19 pandemic (Carmine *et al.*, 2021) like short-term versus long-term, social versus economic, learning versus performing, common good versus individual privacy, and those of structural agency tensions. Over the last four decades many more researchers have explored paradox and of particular interest to this study, ambidexterity in organizations (Gibson and Birkinshaw, 2004; Raisch *et al.*, 2009; Smith, 2014) with many identifying that individuals, groups and organizations are "*inherently* paradoxical" (Lewis, 2000, pp. 760, emphasis in original), immersed in tensions and the demands of attending to those non-linear, disruptive, unsettling and often unplanned concerns that pepper organizational 'doings' i.e., the praxis and practices of practitioners.

Smith (2014) explored how senior leaders attempted to manage organizational pressures and found that the leaders embedded paradoxes into their organization's strategy, but then had difficulty managing those competing tensions, suggesting that paradox potentially distort the sensemaking 'balance' of practitioners. Smith (2014) goes on to say that little is still

known about the management of strategic paradoxes and that this needs further research exploration.

All these 'competing' tensions across the multiple categorizations are said to exist within organizations and many of them surface as salient at the practitioner level rather than at the organizational level alone as stated above, and so from a research perspective, researchers might better recognize the complexity, diversity and ambidexterity of organizational life by using paradox as a framework that enables the examination of the impacts of change within organizations and better aids understanding of organizational actor's (practitioners) differing perspectives and experiences (Cameron and Quinn (1988) cited Lewis (2000)).

More recently Smith, Lewis and Edmondson (2022) proposed a framework for navigating paradox, the 'Paradox System' with four categories of approaches that each describe a toolset to navigate paradox: Assumptions (encompassing cognition, sensemaking and frames), Boundaries (including stable structures, roles, goals, and visions), Comfort (dealing with emotions, feelings, and intuitions), and Dynamics (the topics of change, evolution and adaptation).

With this lack of knowledge around how managers manage the daily pressures of competing, often contradictory strategic demands, comes a potential lack of understanding of how organizational practitioners deal with and make sense of such tensions in their everyday work-life. Raisch *et al.* (2009) suggest that organizational contexts that better enable managers to deal with contradictory and often competing demands may foster improved sensemaking, though one might still imagine that paradoxical tensions may well have an impact on practitioner sensegiving/sensemaking as they deal with the plethora of daily organizational occurring issues.

In conclusion, since by the nature of paradox, there may well be an infinite number existing within organizational experience, this issue for this research is not to comprehend and/or document the specific paradoxes, but to recognize their influence in the narratives and texts that shape the sensegiving/sensemaking and affect the micro level strategizing process.

If Strategy-as-Practice acts as the context surrounding organizational strategizing, itself full of paradoxical demands, then a need for tensions and their implications to be communicated to practitioners in a meaningful way must be important and needs further exploration. Without further understanding practitioners may struggle to work effectively with competing demands, e.g., organizational managers are often asked to conduct cost improvement exercises whilst also attempting to grow their line of business, or take advantage of existing knowledge while developing new knowledge and experience (McKenzie and Van Winkelen, 2004).

Since little is still known about the conditions of when, why, and where sensegiving occurs in organizations (Maitlis and Lawrence, 2007), or what conditions facilitate sensegiving by actors conveying meaning for others and even less is known about the triggers and enablers at the sensegiving/sensemaking interface, then this potential mis-match between the practices of strategy conveyance, via narratives and texts, and the attainment of understanding by strategizing practitioners attempting to 'connect' or 'bridge' between these contradictory demands and how they navigate through the multiplicity of tensions presents a new challenge for research. This all warrants asking **how the tensions present in the organization help or hinder the sensegiving/sensemaking of strategizing practitioners.**

2.4 Returning to the literature

The purpose of the initial literature review was to identify key substantive research domains and place the study in some academic context.

I tried to keep as true to the GTM premise of as little literature review prior to entering the field of study. However, when I began this study as a nascent researcher, I did undertake an initial sensitising literature review which I have since revisited looking for insights (Chapter 2, so far). I subsequently revisited the literature both through the analysis iterations and during the crafting of the findings to offer up insights on what emerged from the data and, with a view of helping to explain or not, (i.e., highlight gaps in knowledge) what I had found.

In line with a Constructionist grounded theory approach, I intended to engage with and relate to the literature as the study proceeded and when necessary. Effectively, I was mainly concerned with the grounded data and where it would lead me. At various points throughout the study's journey when I needed additional signposts, I recognised the need to return to the literature to familiarise myself with the relevant theoretical perspectives. This was also necessary to aid clarity of my own ideas at various stages (Charmaz, 2006). While I brought extensive insider knowledge of the context, practitioner praxis and strategizing practises, I required a deeper understanding of the Organizational Space (Chapter 5, sub-section 5.3.6) and Time (Chapter 5, sub-section 5.5.4.4) debate in relation to the emerging findings to help progress, locate and inform my discussion. A return to the literature was therefore necessary to locate my findings within the relevant theoretical debates and facilitate my discussion in relation to those ideas and the emergent conceptual framework, included in Chapter 5 to maintain the integrity of the process.

Debating the significance of the findings and the nascent theoretical framework within the context of the established literature refines the concept of the conveyance of strategy bridging process and goes some way towards explaining new insights of this socio-material process (Kohtamäki *et al.*, 2022).

2.5 Summary - Chapter 2

This chapter discussed the positioning of a literature review within the scope of a GTM study, then detailed a broad, early review of the literature in the fields of Strategy as Practice, Narratives & Texts, Sensemaking/Sensegiving/Sensebreaking, and Organizational Paradox (sub-section 2.3) with the aim of positioning this study's theoretical backdrop prior to entering the field of research. This was then followed by a review of three further fields, Organizational Space, and Time (in relation to organizational studies), plus metaphors, that became relevant during the analysis stage of the study with the intent of beginning to explain the findings that emerged during the analysis.

Each field of literature had a foundational 'role' to play within this study of the conveyance of IT portfolio strategy practices and, the resulting review of the literature pertinent to each domain raised key arguments and gaps in knowledge. Also highlighted is the potential for this study to contribute to knowledge via suggestions of future roadmaps for new research, and the later stage literature review, which aided explanation of some of the findings and/or supported the final theory building, e.g.,

- SAP (sub-section 2.3.1), acting as the boundary scope of the overall study taking a practice perspective as research should reflect actual practice with some degree of accuracy (Jarzabkowski and Whittington, 2009), and highlighted the need for SAP studies to make connections to other domains to aid the consolidation of SAP's body of knowledge (Kohtamäki *et al.*, 2022),

- Narratives and Texts (sub-section 2.3.2), said to have the property to be "flexible carriers of meaning" (Peirano-Vejo and Stablein, 2009, p. 445) i.e. the vehicles of conveyance, making them an ideal research lens for examining the sensegiving and sensemaking of the portfolio practitioners who deal daily with narratives and texts that initiate, build, reinforce, threaten and tear down, their daily organizational praxis and practices,

- Sensemaking/Sensegiving/Sensebreaking (sub-section 2.3.3), the processes of enabling understanding and influencing understanding, noting that the SAP domain often draws upon the construct of sensemaking/sensegiving in order to shed light on

those practitioner practices and daily actions aligned to organizational outcomes (Balogun and Johnson, 2004; Rouleau, 2005; Rouleau and Balogun, 2011; Balogun *et al.*, 2014),

- Organizational Paradox (sub-section 2.3.4), as the tensions impacting the processes of sensegiving/sensemaking. Organizational life for practitioners is full of competing tensions (Smith, 2014) and if Strategy-as-Practice acts as the context surrounding organizational strategizing, itself full of paradoxical demands, then a need for tensions and their implications to be communicated to practitioners in a meaningful way must be important and needs further exploration,

Ultimately the focus of this study is on practices and practitioner activity that leads to strategic consequences, which rely on the dynamics of sensemaking and sensegiving to realise strategic intent across levels and, manage the duality of continuity and change that organisations need to survive and thrive. Inherently continuity requires upholding the logic of the past whilst change means breaking the logic of the past, and reframing it for the future, so it is likely that paradox and tensions will be inherent in the sensemaking-sensegiving dynamics across time.

Chapter 3 that now follows discusses the research design and positions the study methodologically.

3   Research design: A grounded theory study

"Fortune favours the prepared mind." - Louis Pasteur.

3.1 Introduction and chapter structure

This chapter discusses and justifies the first half of the research design utilized for this study, covering philosophy, other methodologies considered, grounded theory method, and on to the topic of insider research. Chapter 4 then presents and discusses the application of GTM as both methodology and methods.

As Blaikie and Priest (2019, p. 18) state "A research design is an integrated statement of, and justification for the technical decisions involved in planning a research project. [It] involves anticipating all aspects of the research and then planning for them to occur in an integrated manner"

The remainder of this chapter is structured as follows:

- Section 3.2 considers the research philosophy (ontology, and epistemology) applied. It argues that a relativist ontology is appropriate (Charmaz and Belgrave, 2002; Charmaz, 2006; Mills, Bonner and Francis, 2006) and supports the adoption of a social constructionist epistemology, consistent with interpretive studies of sensegiving/sensemaking, to shed light on the sensegiving/sensemaking process that occurs during the conveyance of strategy for execution (Charmaz, 2006; Rouleau, 2005),
- Section 3.3 provides an understanding of the philosophical under-pinning's of each primary academic literature domain pertinent to the study, along with a discussion on the researchers own philosophical stance,
- Section 3.4 covers a review of the other potential methodologies that might have been employed in this study (Action Research, Case Study, and Ethnography) and leads to a justification of GTM,
- Section 3.5 discusses the evolution of Grounded Theory Method (GTM) and the ultimate choice to align the study with the Constructionist GTM 'school' as methodology,

- Section 3.6 discusses the positioning of researcher as an 'insider', the benefits of insider research, and the techniques employed to lessen potential insider bias, and,
- Section 3.7 summarizes this chapter.

3.2 Theoretical foundations

3.2.1 Research philosophy

As Easterby-Smith, Thorpe and Jackson (2012, pp. 17-18) states:

"Awareness of philosophical assumptions can both increase the quality of research and contribute to the creativity of the researcher."

The interaction between the research paradigm adopted for a study and my own views of reality, as the researcher, have implications for the results of social science research (Refai, Klapper and Thompson, 2015). Both academic tradition and the researchers' own philosophical perspective play much in the final selection of the ultimate research frame and this research would fall short if not well positioned within this ongoing debate.

3.2.1.1 Relativist ontology

Within the natural sciences philosophers continue to debate the nature of reality between realism (a single truth where facts exist and can be revealed) and relativism (Easterby-Smith, Thorpe and Jackson, 2012). The "Relativist ontology is the belief that reality is a finite subjective experience (Denzin & Lincoln, 2005) and nothing exists outside of our thoughts. Reality from a relativist perspective is not distinguishable from the subjective experience of it (Guba & Lincoln, 2005) cited (Levers, 2013, p. 2).

As Easterby-Smith, Thorpe and Jackson (2012, p. 19) discuss, relativism subscribes to 'many truths' and "that they are created by people", while Levers (2013, p. 2) states "The purpose of science from a relativist ontology is to understand the subjective experience of reality and multiple truths"

To ponder on the nature of reality, what is real? (Ontology), and knowledge, how can we know? (Epistemology), is a philosophical debate as old as human thought (Berger and Luckman, 1966) with its roots going "back before recorded time" (Remenyi *et al.*, 2010), and one that spurs on an ever continuing discussion between the "matters of ontology and epistemology." (Easterby-Smith, Thorpe and Jackson, 2012, p. 17).

If one took a realist stance then all phenomenon would be observable ("Facts exist and can be revealed" (Easterby-Smith, Thorpe and Jackson, 2012, p. 19)) and a single truth would be discoverable.

However, subscribing to the notion that one single truth is undiscoverable, as this would deny the multiple perspectives and thus the realities of social life (Relativism suggests "that scientific laws are not simply out there to be discovered, but they are created by people." (Easterby-Smith, Thorpe and Jackson, 2012, p. 19)), then as Berger and Luckman (1966, p. 13) suggest "reality is socially constructed and that the sociology of knowledge must analyse the process in which it occurs.".

Social Constructionism, as research paradigm (Merton, 1949; Berger and Luckman, 1966), and Grounded Theory Method (GTM) as research methodology (Glaser and Strauss, 1967; Charmaz, 2006), both adopted in this research, are themselves no strangers to the ebb and flow of academic discussions on the nature of reality.

Applying a paradox perspective to the nature of reality when researching organizations takes this view of reality further in that "understandings emerge over time, created from the juxtaposition of opposing forces and focused via actors' cognitions and social constructions." (Lewis and Smith, 2014, p. 143). People then, create their own truths (Smith, 2014) relative to their context, and community, based on the norms and knowledge available to them during a specific time period where paradox are permanently latent, but become salient dependent upon particular circumstances present at that time (Lewis and Smith, 2014).

Further, Lincoln, Lynham and Guba (2011, pp. 98, Table 6.1) suggest a relativist ontology supports an epistemological position of the view of reality as constructed where "local and specific constructed and co-constructed realities" dominate. If at the heart of the ontological position is a focus on a subjective reality that emerges from the way people think, communicate, and interact, understanding how individuals interact to know their world and co-construct meaning influences the research paradigm applied to a piece of conducted research (Lincoln, Lynham and Guba, 2011).

Lincoln, Lynham and Guba (2011, pp. 100, Table 6.5) further suggest that researchers homed within a constructionist-based (interpretivist) epistemology will "*attempt to gain increased knowledge regarding their study and subjects by interpreting how the subjects perceive and interact within a social context".*

Here, an additional note is warranted to briefly define the seemingly interchangeable use of the term social constructionism and that of social constructivism. As Guterman (2006, p.13) cited (Sommers-Flanagan and Sommers-Flanagan, 2015, p. 370) states "Although both

constructivism and social constructionism endorse a subjective view of knowledge, the former emphasizes individuals' biological and cogitative processes, whereas the latter places knowledge in the domain of social interchange."

Social constructivism focuses then on how an individual constructs their own reality/world, while social constructionism focuses instead on social interactions between people/communities, as Gergen (2015, pp. 30, emphasis in original) states "*constructivism places the origin of knowledge in the head of the individual, social construction places the origin in social practices.*". Unfortunately social constructionism (socially constructed, construction) and social constructivism are often used interchangeably by some social researchers (Charmaz, 2006; Denzin and Lincoln, 2011; Bryant and Charmaz, 2011), while others consider them very distinct constructs (Crotty, 2014).

Constructionism is more interested in social phenomena and the processes of construction. Constructivism is interested in the way the mind works. In conducting research studies each may require different methods to collect data e.g., repertory grid (based on personal construct theory (Easterby-Smith, Thorpe and Jackson, 2012)) is used for social constructivism ("The technique [repertory grid] is used to understand an individual's perceptions and the constructs they use to understand and manage their world." (Easterby-Smith, Thorpe and Jackson, 2012, p. 209)), but not for social constructionism and, critical incident technique is often applied as an individualized interview technique to explore how individual actors construct their world when faced with a crisis (Strid *et al.*, 2021). Social constructionism on the other hand often uses such data gathering tools such as open-unstructured or semi-structured interviews, ethnographic observations, visual methods and primary texts (Easterby-Smith, Thorpe and Jackson, 2012).

Given this study's focus on the socially constructed sensegiving-sensemaking process underpinning strategy conveyance, I chose to adopt a constructionist stance for this research. Both Organizational Paradox and SAP, within this research study, follow a social constructionist bent. Organizational Paradox focuses between practitioners within a system, and SAP looks at the shared understanding and meaning in a co-created organizational setting.

If the process by which the researcher seeks new knowledge follows an interpretive methodology, i.e. hermeneutic in nature (Lincoln, Lynham and Guba, 2011) and explores a study question that lends itself to qualitative research e.g., need for theory building, illumination of a complex social phenomenon or analysis of diverse material data sources

(Strauss, 1987), one can expect a heavy reliance on methods such as interviewing, observations and analysis of existing texts (Cassell and Symon, 2004), (consistent with GTM and SAP data gathering methods) to be utilized.

The birth of GTM was itself a direct challenge to the positivistic establishment searching for the one single truth through quantitative methods so prevalent in academia during the 1960's (Glaser and Strauss, 1967). The evolution of GTM is discussed more fully below (section 3.4), however it would be remiss to not discuss the under-pinning of Symbolic Interactionism (SI) and its potential relevancy to the research domains of sensemaking and texts (often full of symbols, where symbols are defined as "*categories of social construction with ascribed meanings defined by the agents and audiences who use them.*" (Schnackenberg *et al.*, 2019, p. 376, emphasis in original)), both foundational components to this study.

Symbolic Interactionism is founded on three premises, "that human beings act towards things on the basis of the meanings that the things have for them…that the meaning of such things is derived from, or arises out of, social interaction…that these meanings are handled in, and modified through, an interpretative process used by the person in dealing with the things he encounters." (Blumer, 1969). Following on from this, Allard-Poesi (2005) suggests that in keeping with the SI tradition of Mead and Blumer, "interpretivists and sensemaking researchers consider that, whatever the research, the participants' point of view are essential" (Allard-Poesi, 2005, p. 178) and if they are to stay true to the sensemaking tradition of Weick that "it is through the meanings and symbols they use and create from social interaction and communications that they produce their world and reality (Weick, 1995, p. 41)" cited Allard-Poesi (2005, p. 178).

Weick, Sutcliffe and Obstfeld (2005, p. 409) do state though that "sensemaking as a process that is ongoing, instrumental, subtle, swift, social, and easily taken for granted.", and that "sensemaking is, importantly, an issue of language, talk, and communication. Situations, organizations, and environments are talked into existence.".

Tsoukas and Chia (2002, p. 570) take this notion of organizations being talked into existence a stage further and state that "organization is a pattern that is constituted, shaped, emerging from change" which we attempt to make sense of as a change process that transitions from time-sliced position to position, and that more importantly what is between each position represents the micro-processes of change, i.e. "continually in a state of organizational becoming" (Langley *et al.*, 2013, p. 5).

So, if you approach theorizing about organizations through Heraclitus' view of reality i.e. "not as a constellation of *things* but as one of *processes*" cited (Langley *et al.*, 2013, pp. 5,

emphasis in original) then the focus of social scientific research needs to comprehend those organizational processes (e.g., collective sensemaking, sensegiving, communicating etc.), where processes meet practices, activities and occurrence over time (Langley *et al.*, 2013).

As Langley *et al.* (2013, p. 6) state "Research capable of developing fine-grained understanding of processes at the micro-level requires … prolonged and deep engagement, combined with attention to reflexivity".

Practitioner enactment of strategy sits within an academic domain known as Strategy-as-Practice (SAP) and encompasses not only what strategizing practitioners do i.e., "actors involved in strategy-making" (Vaara and Whittington, 2012, p. 287), but what practices they employ such as the "tools, norms, and procedures of strategy work" (Vaara and Whittington, 2012, p. 287), and how they conduct their daily practices i.e., praxis, defined as "activity involved in strategy-making" (Vaara and Whittington, 2012, p. 287).

The ways in which strategy is conveyed within an organization, the organizational tensions (Smith and Lewis, 2011) that affect those communication exchanges and, the mechanisms in the form of narratives and texts associated with the conveyance of strategy (Fenton and Langley, 2011) may well affect practitioner understanding.

We know that sensemaking has to do with how practitioners understand, interpret and create sense for themselves based on information available and often shared by sensegiving practitioners attempting to influence other practitioners understanding in some way (Rouleau, 2005). It's also apparent that sensegivers utilize reflexivity when attempting to influence practitioner sensemaking efforts (Robert and Ola, 2021). Sensegiving and sensemaking are important then for aiding practitioners in reaching both individual and/or shared meaning that allows them to deal with "moving through time and space" (Dervin, 1998, p. 7) while answering questions in order to improve their understanding of situations/events, "constructing bridges" to cross the gaps of knowledge, communication and information (Dervin, 1998, p. 7), and still reach outcomes even while dealing with everyday organizational tensions. Additionally, if managers, acting as sensegivers, are to craft compelling messages that cause positive action then the "content and nature of conversations matter" (Rouleau and Balogun, 2011).

The foregrounding arguments presented above opened up for consideration the need for a longitudinal grounded theory study. To attain this fine-grained understanding of micro-processes of strategy conveyance to the choice was made to examine longitudinally the sensegiving / sensemaking process between strategizing practitioners during the conveyance of strategy for action (in the traditional of SAP). Not only did this study aim to

understand this sensegiving / sensemaking process further, but also attempted, through the meta-theoretical lens of organizational paradox (Lewis and Smith, 2014; Schad *et al.*, 2016), to uncover those tensions that aided or hindered the bridging process (illustrated using the metaphor of a suspension bridge: Figure 3-1).
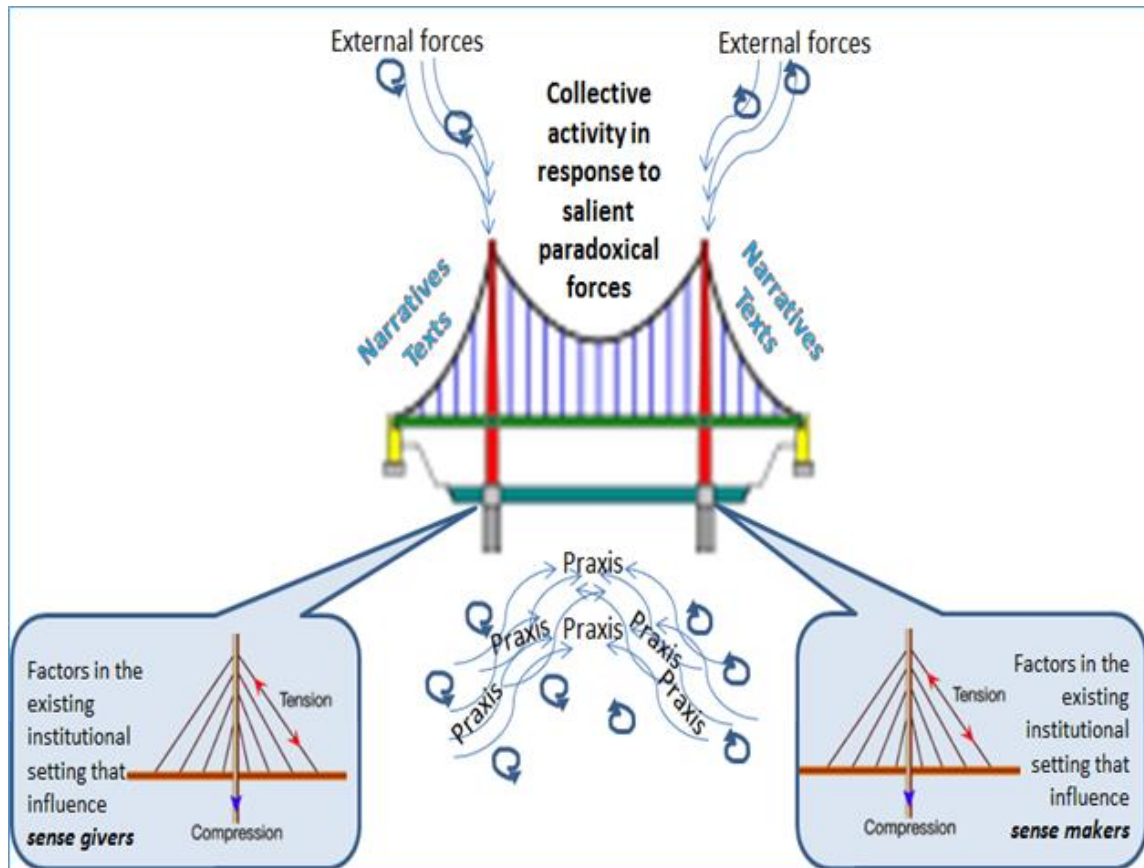
Figure 3-1: Visual representation of bridging process and tensions via the metaphor of a suspension bridge

Having erected the ontological, epistemological, and methodological scaffolding for this study, it is necessary to further build on the discussion by considering the philosophical alignment of the study's predominant domains of academic literature (Figure 3-2), the evolutionary backdrop of GTM, and the researchers own philosophical stance followed by a discussion on insider research.
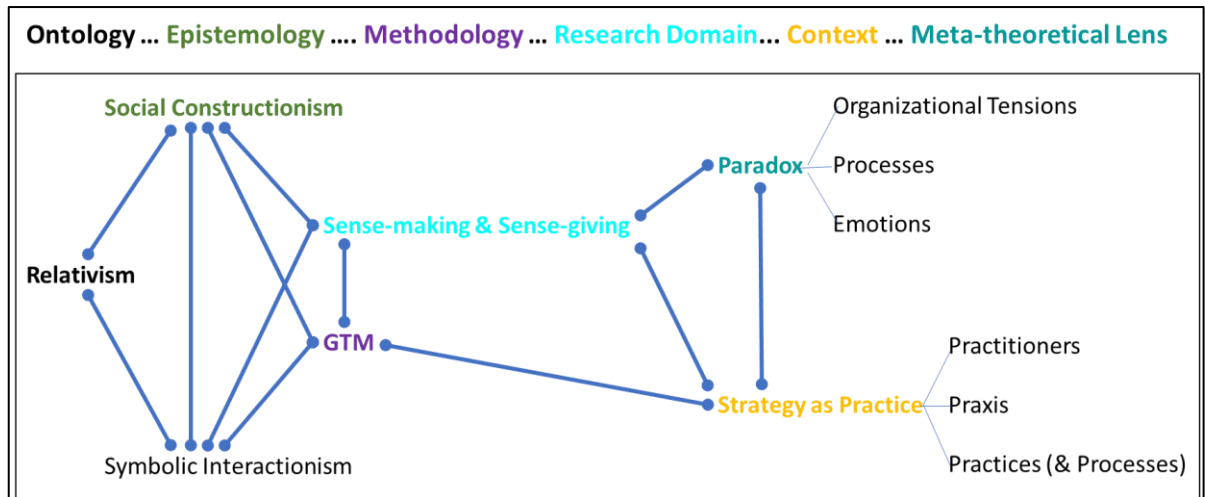
Figure 3-2: Philosophical alignment of the study's predominant domains of literature

3.3 Academic domain philosophies

Social research theorists in the domains of SAP (Jarzabkowski and Whittington, 2009), Narrative and Texts (Fenton and Langley, 2011), Sensegiving/sensemaking (Rouleau and Balogun, 2011), and Paradox (Smith and Lewis, 2011), have adopted a range of philosophical positions (discussed below briefly and in detail in the literature review chapter (Chapter 2) of this thesis) both within and across each theoretical domain.

The predominant theorists of the SAP domain coupled with a Sensegiving/Sensemaking perspective often adopt a 'narratives of practice' and 'co-construction sensegiving/sensemaking' approach to their studies (Balogun and Johnson, 2004; Balogun and Johnson, 2005; Maitlis and Lawrence, 2007; Laine and Vaara, 2007; Rouleau and Balogun, 2011), consistent with the stance of Social Constructionism. A discursive approach (Vaara, Sorsa and Pälli, 2010; Balogun *et al.*, 2014; Brown and Thompson, 2013) that focuses on "the flow of language-in-use across time and its effects on actors' interpretations and activity" (Kohtamäki *et al.*, 2022) is also often applied (Samra-Fredericks, 2003).

The field of narratives and texts within the SAP domain again is consistent with a social constructionist frame (Brown, Stacey and Nandhakumar, 2008; Brown and Thompson, 2013; Fenton and Langley, 2011; Peirano-Vejo and Stablein, 2009) and is often coupled with a sensemaking/sensegiving interpretive lens, itself founded in work of social reality and organizational sensemaking (Weick, 2001; Weick, Sutcliffe and Obstfeld, 2005; Weick, 2012).

Moving to the academic domain of Paradox (including Ambidexterity) and suggested by Andriopoulos and Lewis (2009) as "methodologically limited", studies range in methodological foundation from interpretative case studies (Andriopoulos and Lewis, 2009; Smith, 2014) through to quantitative statistical survey-based studies (Gibson and Birkinshaw, 2004; Mom, van den Bosch and Volberda, 2009). Whilst Hahn and Knight (2021) note that at the deepest level most researchers approach paradox with a social constructionist lens, but until recently have only focused on single paradoxes within the studies. There have also been calls for more complexity in paradox theorising which suggest that the interactions between the paradoxes are important (Schad *et al.*, 2016; Smith *et al.*, 2017).

The later additions of a further two domains (Organizational Space, and, Time) are also worth mentioning, with Organizations Space seen as a social process i.e., socially constructed (Taylor and Spicer, 2007), while Time, and in particular how "different social groups create or culturally construct different types of time" (Ancona *et al.*, 2001, p. 515), both these later bodies of knowledge maintain the congruence of the social construction stance.

Ultimately the positioning within the study was in part due to the level of reflexivity felt necessary to support interpretation within a constructionist GTM study, i.e. the fostering of the researcher's reflexivity about their own interpretations (Charmaz, 2006), the need to capture study participants narratives and experiences, the depth of sensemaking needed by both the participants and researcher (in understanding and internalizing new strategies) and the studies pursuit of theory generation through interpretive methods.

3.4 Alternative methodologies considered

When I began this study, I knew right from the start I would adopt the grounded theory method as the research methodology even after warnings GTM was not for the nascent researcher or faint of heart. However, to make sure that GTM was the appropriate methodology to use in this study I considered other potential methodologies for their suitability. The three methodologies evaluated were Action Research, Case Study, and Ethnography.

3.4.1 Action Research

Action research (AR) adopts philosophies of practical knowing (Coghlan, 2011), and is often used in the management of change (Remenyi *et al.*, 2010) based on readily available and validated evidence and theory (Heller, 2004). Researchers who apply AR enter the field with a view to effecting change through co-creating knowledge with those involved in the context.

AR is the process of systematically collecting data about an ongoing system and/or process change focusing on the moment by moment thinking of the practitioners and their enactment of practices, in regard to some objective or goal; then feeding data back in to the system and/or process while taking some action to alter practice within the system and/or process under study, then evaluating the results of the actions and repeating the cycle again (Remenyi *et al.*, 2010). Action research involves small-scale interventions by the researcher on the topic of study (which assumes the social phenomena are continually changing (dynamic) rather than static (Easterby-Smith, Thorpe and Jackson, 2012)), and that the researcher becomes an equal in the process of creating the change alongside other practitioners (Easterby-Smith, Thorpe and Jackson, 2012).

So, AR could have been relevant, but as the topic of research within this study was intended to look at the how and why of the conveyance of IT portfolio strategy through a meta-theoretical paradox lens rather than focusing on the needs of the co-practitioners/researchers who put new knowledge into practice within the context, AR was not deemed a suitable methodology to adopt.

Although AR focuses on practice, I was not trying to effect change in the context, but to learn about the 'doing of strategy' as it was being practiced. I did not want to fall into the trap of the methodological limitations of single context, but instead wanted to develop transferable propositions for researchers beyond the context of action.

I was not attempting to alter a system and/or process but rather to build theory based on gathering knowledge and insight on how the sensegiving-sensemaking occurred through the evolving conveyance practices.

3.4.2 Case Study

Having eliminated AR as a possible research methodology I next turned my attention to evaluating Case Study as a suitable candidate methodology.

"The case study is a research strategy which focuses on understanding the dynamics present within single settings." (Eisenhardt, 2002, p. 8) and can be used to provide description, test theory, or generate theory (Eisenhardt, 2002). The use of case study is said to sit on a spectrum (Easterby-Smith, Thorpe and Jackson, 2012), from those who advocate single cases to those who advocate multiple cases, with the single cases generally coming more from a constructionist/constructivist epistemological stance (Stake, 1995), and those who advocate the multiple case usually fitting more with a positivist epistemology (Yin, 2009),

with the middle of the spectrum drawing from both the positivist and constructionist positions (Eisenhardt, 1989).

Looking at the key features of each of these differing epistemologies in relation to case study (Table 3-1), it became apparent that only the Constructionist form, where the design was emergent, would support the single case organization I planned to conduct my research within.

	Positivist (Yin 2009)	Positivist and Constructionist (Eisenhardt 1989)	Constructionist / Constructivist (Stake 1995)
Design	Pre-developed before entering field of study	Use designs established at the start but be flexible and adapt	Design is emergent
Sample	15+	4-10	1 (or more)
Analysis (of case(s))	Across the cases	Across and within the cases	Within the case
Theory	Testing	Generation	Action or generation

Table 3-1: Key features of case study by differing epistemologies

However, Hartley (2004, p. 323) suggests that "case study is not a method but a research design" while Mfinanga, Mrosso and Bishibura (2019) identify weaknesses related to case studies such as its credibility in regard to items such as:

1. Theoretical context interdependent knowledge is seen as more valuable that practical context-dependent knowledge,

2. It is not possible to generalize on the basis of an individual case study,

3. Case studies contain verification bias with a tendency to reaffirm the researcher's preconceived notions, and,

4. It is considered difficult to summarize and develop general theoretical propositions on the strength of specific case studies.

However, Eisenhardt (Eisenhardt, 1989; Eisenhardt, 2002) presents a compelling argument that building theory from case studies is highly possible and later in the form of the "Eisenhardt Method" (Eisenhardt, 2021, p. 148) that the 'method' "is first and foremost about building theory" from multiple case studies which takes advantage of constant comparison between contexts. Ultimately the goal of a case method is to understand a contemporary situation within its real-life context (Stake, 1995; Yin, 2009) with a potential to generate theory.

As I intended to conduct research in a single organization, I needed a methodology that focused wholly on the generation of theory via the exploration and explanation of a particular situation or process. Thus, I moved on to evaluate Ethnography as a possible methodology.

3.4.3 Ethnography

Ethnography is one of the approaches within the field of social research often more associated with qualitative study, however the meaning of the term ethnography can alter based on the many variants of ethnography in existence today, e.g., collaborative ethnography, urban ethnography, narrative ethnography (Campbell and Lassiter, 2015), auto-ethnography, virtual ethnography, and anthropological ethnography to name a few (Hammersley and Atkinson, 2007).

Ethnography owes its origins to the world of Western anthropology from the 1800s, "where an ethnography was a descriptive account of a community or culture" (Hammersley and Atkinson, 2007) and "Ethnographic field research involves the study of groups and people as they go about their everyday lives." (Emerson, Fretz and Shaw, 2011). Over time, as more researchers conducted their own fieldwork, ethnography came to refer to "an integration of both first-hand empirical investigation and the theoretical and comparative interpretation of social organization and culture" and as a result ethnographic fieldwork is viewed as core to anthropology (Hammersley and Atkinson, 2007).

The backbone data gathering method within the ethnographic domain is that of observation (supported by field notes), defined as "the systematic description of events, behaviors, and artifacts in the social setting chosen for study" Marshall and Rossman (1989) cited in (Kawulich, 2005), with Malinowski, an early 20th Century anthropologist, generally credited for the design of a systematic method of conducting fieldwork that placed direct participation in the toolkit of ethnographic observation.

Ethnographers and researchers 'construct' their writing (of field notes) through a selective process, writing down those moments from observations that they feel are significant in some

way. Each moment is recreated for the reader through the portrayal of words, sights, and sounds recorded in jottings, or photographs, participant movements, tone of voice, arm gestures, etc. The researcher is ultimately attempting to recreate and impart a sense of experience, through a narrated vignette of integrated details that attempts to paint a picture in the readers minds-eye so to speak, knowing however that no writing can every completely represent what occurred in life / lived experience.

Ethnography and GTM share the need to understand events, behaviours and cultural meanings and interpret those experiences. Grounded theory methods employ flexible strategies for gathering and analyzing data also useful to ethnographers (Charmaz and Mitchell, 2001). Ethnographic observations are an often-utilized method applied alongside other techniques in a GTM study (Charmaz, 2006; Corbin, 2015). Ultimately the primary goal of ethnography is to provide a description of the culture (rather than the whole context) of a studied group, tribe or organization, whereas GTM aims to generate theory that explains a phenomenon (Datt, 2014).

In summary, and as a result of this research methodology review, I continued forward with GTM as both methodology and method, though I did choose to include ethnographic observation as a component of the studies data gathering methods (see section 4.8).

3.5 Grounded Theory Method as methodology

"The Grounded Theory Method (GTM) comprises a systematic, inductive, and comparative approach for conducting inquiry for the purpose of constructing theory." (Bryant and Charmaz, 2011, p. 1). Additionally Constructionist GTM weaves theory into the hermeneutic interpretation, and so also includes abductive logic (Charmaz, 2006). As Andriopoulos and Gotsi (2017) suggest, at times researchers will need to employ a repertoire of methods with methodologies using all the logics at different times in the research process.

GTM was born with the foundational work of Barney G. Glaser and Anselm L. Strauss during the 1960s and captured in their four seminal texts: 'Awareness of Dying' (Glaser and Strauss,1965), followed by 'The Discovery of Grounded Theory' (Glaser and Strauss, 1967), 'Time for Dying' (Glaser and Strauss, 1968), and Status Passage (Strauss, 1971).

Glaser and Strauss' key aim with the development of GTM was to foreground the *generation* of theory as opposed to the empirical verification of existing grand theory (Bryant and Charmaz, 2011), and with the key theme being "the discovery of theory from data systematically obtained from social research" (Glaser and Strauss, 1967, p. 2).

Glaser and Strauss intended to provide a clear foundation for systematic qualitative research that could claim equivalent status to quantitative work of the period but suggesting that data could generate more than just numerical values (Bryant and Charmaz, 2011).

Glaser and Strauss came together at the University of California during the 1960-1970's, but their previous individual backgrounds later led to their, and GTM's divergence (Bryant and Charmaz, 2011) when in 1990 Strauss and Corbin published the '*Basics of Qualitative Research: Grounded Theory Procedures and Techniques'* (Strauss and Corbin, 1990). Glaser responded that Strauss and Corbin's ideas led to "forcing the data rather than emergence" Glaser (1992) cited (Bryant, 2013, p. 10) and he particularly disliked the coding paradigm and published in 1992 the '*Basics of Grounded Theory: Emergence versus Forcing'* as his response.

Over the fifty years since the publication of the GTM seminal texts and the subsequent split in direction by Glaser and Strauss many "epistemological shifts and developments" (Bryant and Charmaz, 2011), have occurred leading to the recognition of three predominant and distinct 'versions' of the methodology: The Glaserian school of GTM, the Strauss and Corbin school, and the Constructionist school (Bryant and Charmaz, 2011). Briefly:

- The Glaserian school of GTM is heavily influenced by Barney G. Glaser's personal academic heritage (Bryant and Charmaz, 2011), where Glaser's PhD studies under the guidance of the theorists of the day at Columbia University, Paul Lazerfeld and Robert Merton, was quantitative methods in focus (Birks and Mills, 2011),

- The Strauss and Corbin school of GTM alternatively was influenced initially by Strauss' background in Symbolic Interactionism, and continued to pay homage to the Chicago School's emphasis on pragmatist philosophy and ethnographic field research methods (Bryant and Charmaz, 2011),

- The Constructionist school of GTM takes into consideration the fifty years of evolutionary development of Glaser and Strauss's foundational work and places emphasis on the integration of "how data, analysis and *methodological strategies* become constructed" (Bryant and Charmaz, 2011, pp. 10, emphasis in original), plus includes the researchers own perspectives and interactions, along with the research study context.

When designing this study consideration was given to the methodological concerns associated with a GTM study (Urquhart, Lehmann and Myers, 2010) and extensive readings of both the foundational and more recent Constructionist GTM texts was undertaken to well

know the differences (Figure 3-3) between the three schools of GTM and, discuss why ultimately the Constructionist GTM methodological stance was applied.

Glaserian	Strauss & Corbin	Constructionist
Objectivist; Inductive, emergent theory[1,2]	Symbolic Interactionalist; Inductive/Abductive, theory generation (conceptual description)[2]	Constructivist; Interpretative, theory building (construction)[2]; Theorizing is both inductive and abductive[3]
Data reside in external reality and can be examined[2]	Field observation, 'What is going on?'[2]	Data is co-constructed (Researcher, context, participants and interactions)[3]
Let data emerge, and do not ask extensive questions of research participants; All is data[2]	Codes emerge from data; Theory traceable to the data[2]	Researcher takes an active role in data; data is not all; Theories do not emerge from the data[5]
Does not acknowledge that a researcher's own perspective or knowledge shapes what they can see[5]	Researcher brings pre-existing knowledge to aid process of theoretical sensitivity[4]	Researchers own knowledge and perspectives cannot be removed, co-constructs[3]
Engage emergent theory with existing literature[7]	Literature used to stimulate theoretical sensitivity[4]	Literature utilized iteratively during data capture/data analysis cycle[3]
Coding: Open, substantive, and theoretical[5]	Coding: Open, axial, selective[5]	Coding: Initial, focused, theoretical[5;] Conceptual categories[3]
18 Coding families[5]	Coding paradigm[4] (conditions, contexts and actions), and Conditional matrix[7]	

1 – Birks and Mills (2011); 2-Bryant and Charmaz (2011); 3-Charmaz (2006); 4-Strauss and Corbin (1990); 5-Bryant (2013); 6-Glaser and Strauss (1967, 2008); 7-Uquhart (2013)

Figure 3-3: Comparison of the three predominant schools of GTM

Originally anchored in a positivist, objectivist epistemology which assumes that reality can be discovered, explored and understood, today this is seen as an early weakness in GTM, though Glaser and Strauss's early texts do show more concern with researchers providing insight, imagination and theory development (Bryant and Charmaz, 2011).

Having earlier discussed that a relativist ontology and social construction paradigm were applied to this study, understanding the features of a constructionist GTM approach may further illuminate the final selection.

Constructionist GTM is considered a highly flexible, active process, reflexive in nature and considers multiple perspectives supported through several key features, with the aim of

generating substantive (grounded within the context within which the experience and data were gained (Bryant, 2013, p. 23)) theory[11] i.e.:

- Researcher involvement in iterative/simultaneous data collection and analysis:

    - "Leads researcher to examine all possible theoretical explanations" (Bryant, 2013, p. 4).

- GTM Coding (Initial, Focus and Theoretical):

    - Codes developed after capturing some data, followed by initial coding, and then iterating around data capture and analysis. Literature reviewed throughout process.[12]

- Constant comparison:

    - Comparing data between points in time, different people, interactions, relationships, events. This constant comparison of different levels of data at each conceptual level of analysis drives the theoretical sampling and the ongoing collection/generation of data (Birks and Mills, 2011). As Birks and Mills (2011, p. 94) state it "is this iterative analytical method of constantly comparing and collecting or generating data that results in a high level of conceptually abstract categories rich with meaning". GTM also uses constant comparison because it allows the weaving in of theory during the interpretation process i.e., via abductive theorising, and thus the theory becomes more transferable across contexts (Sætre and Van de Ven, 2021).

- GTM Memos:

    - Used to "conceptualize the data in narrative form" Lempert (2007) cited (Bryant, 2013, p. 8) and noting as Strauss (1987, p. 110) suggests "Even

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[11] Subscribing to the Constructionist view of theory as an interpretative task, "Interpretative theory calls for the imaginative understanding of the studied phenomenon. This type of theory assumes emergent, multiple realities; indeterminacy; facts and values as linked; truth as provisional; and social life as processual." Charmaz, K. (2006) *Constructing Grounded Theory A Practical Guide Through Qualitative Analysis.* London: Sage..

[12] Recognizing that as Suddaby, R., Hardy, C. and Huy, Q. N. (2011) 'INTRODUCTION TO SPECIAL TOPIC FORUM. WHERE ARE THE NEW THEORIES OF ORGANIZATION?', *Academy of Management Review* 36(2), pp. 236-246. suggest there is a need for deeper attention and self-reflection on the part of the research community in relation to the process of theory creation. Ibid. further suggest "a number of approaches to develop more creative, insightful organizational theories." have been proposed and summarize them along the two dimensions of i) theorizing within one academic literature/knowledge area or across multiple areas, and ii) theorizing with implicit assumptions or explicit constructs in the focus domain.

> when a researcher is working alone …, he or she is engaged in continual
> internal dialogue" that charts the course and evolving discussion around
> insights, codes, thoughts, conceptual categories and emergent frameworks.

- Theoretical sampling aiming at theory construction

    - "whereby the analyst decides on *analytic grounds* what data to collect next
      and where to find them" (Strauss, 1987, pp. 38, emphasis in original), and
      "seeking pertinent data to *develop* your emerging *theory*." (Charmaz, 2006,
      pp. 96, emphasis in original) with the purpose of elaborating and refining
      categories that make up the developing framework/theory.

- Theoretical saturation

    - Knowing when to stop gathering data, GTM makes this an explicit feature
      each researcher should address

        - "Categories are 'saturated' when gathering fresh data no longer sparks
          new theoretical insights, nor reveals new properties of those core
          theoretical categories." (Charmaz, 2006, p. 113).

- Theoretical sorting, diagramming, and integrating

    - The logic of how to organize the analysis and refine theoretical links.
      "Diagramming is *the* creative tool to use when operationalizing the logic of
      abduction." (Birks and Mills, 2011, pp. 105, emphasis in original).

With the discussion of the evolution of GTM and the ultimate choice to align the study with
the Constructionist GTM 'school' articulated, I move next to articulate my own philosophical
viewpoint as the researcher conducting this study.

3.6 Researchers' philosophy

My personal ontology is one of a relativist affiliation with a strong belief that reality is a
product of everyday social interactions and relationships between people, events that occur
and the general enactment of the world around them, i.e. a social constructionist
epistemological stance (Hammersley, 2002; Easterby-Smith, Thorpe and Jackson, 2012).

Additionally, holding with Birks and Mills (2011) view that a researcher's personal philosophy
and how they see the world both influence the research strategy and the techniques applied

in achieving the study aim, further articulation of the research context and this particular researchers position within the study arena is warranted.

The organization where this research was conducted was a large division (hereafter referred to as Cloud) within a large global 50 IT Services company (hereafter referred to as SpinCo), with the researcher actively employed by SpinCo in the role of a 'Director' responsible for several Cloud functions including Portfolio Strategy during the study period (2013-2018).

The role of the lead strategizing practitioner for Cloud meant that access to the organization was open (post corporate and academic ethics approval attainment) and that insider research was conducted by an organizational 'native' (Kanuha, 2000). Early in the 1970's Robert Merton defined Insider research as an individual who had *a priori* in-depth knowledge of the organization and its members (Merton., 1972) and, Brannick and Coghlan (2007, p. 59) later defined insider research as "research by complete members of organizational systems and communities in and on their own organizations" as opposed to organizational research that is conducted by academic researchers who 'visit' with an organization.

I chose to subscribe to the following definition proposed by Greene (2014, p. 1) "Insider research is that which is conducted within a social group, organization or culture of which the researcher is also a member." as this researcher was both researching inside their own organization as an organization member, while also being a researched participant, i.e.: an indigenous-insider (Banks, 1998) and in ethnographic terms, a "*participant-as-observer*" (Waddington, 2012, p. 154) who simultaneously enacts the self/other repertoire (Tedlock, 1991).

Further discussion on the pros (e.g., deep organizational knowledge, natural interaction with organizational members, access (Greene, 2014)) and cons (e.g., potential for bias, heightened subjectivity, threat to validity, confidentiality, power, access and flowing identity (Greene, 2014)) of conducting research in the site of one's own practice and the ways (such as reflexivity) and tools to apply to reduce potential bias are further articulated in sub-sections 3.6.1 and 3.6.2. below.

Given the participant-as-observer (Waddington, 2012) nature of the researcher within both the study and the organization, it is also necessary to articulate my researching-strategist's position as both a sensegiver (practitioner and researcher) and a sensemaker (practitioner and researcher).

As CPS's lead strategizing practitioner (Jarzabkowski, Balogun and Seidl, 2007), the task of both developing and then communicating the go to market strategies and direction of the CPS offerings portfolio, via narratives, (Brown, Stacey and Nandhakumar, 2008; Brown and

Thompson, 2013) in the form of virtual audio broadcast meetings, and texts in the form of Microsoft PowerPoint™ slides (Spee and Jarzabkowski, 2011) placed me, the strategist, in the role of a sensegiver.

The sensegiver conveyance of those CPS strategies occurred both across the organization with and to peers (senior middle managers, (Rouleau, 2005)) and to the sensemaking Portfolio Offering Managers (middle managers, (Rouleau, 2005; Rouleau and Balogun, 2011)) within the organization responsible for executing the articulated strategic direction, i.e. creating and sustaining those offerings sold to enterprise clients.

Academically, Maitlis and Lawrence (2007) proposed sensegiving as a primary leadership function supporting this study's proposition that the examination of how managers give sense to others when conveying strategies was a worthwhile topic of exploration.

Further, sense also had to be made of the data and analysis resulting from the ongoing interactions throughout the study, i.e., researcher acting as a sensemaker, while the original sensegivers were continuing to make sense of the feedback they were in receipt of from the sensemakers.

3.6.1 Insider research

Insider research, as Brannick and Coghlan (2007, p. 59) suggest, is "research by complete members of organizational systems in and on their own organizations." and further state that "within each of the main streams of research [positivism, hermeneutics, and action research], there is no inherent reason why being native is an issue and that the value of insider research is worth reaffirming." (Brannick and Coghlan, 2007, p. 59).

In undertaking research in the site of one's own practice, however, researchers must be cognizant that a balancing of roles will be required, i.e.: that of simultaneously being a practitioner and an academic researcher. As an in-situ practitioner, earning trust with colleagues (who will also be research participants) is potentially unnecessary as there is little disruption to the normal daily practices and routine. However, when wearing the 'academic researcher hat' those same participants may need additional reassurances, especially around confidentiality of what's discussed during interviews, and/or the anonymizing of data source, from the insider researcher (Bonner and Tolhurst, 2002).

In summary, "*Qualitative research* is a situated activity that locates the observer in the world." Denzin and Lincoln (2011, pp. 3, emphasis in original).

3.6.2 The insider researcher

Bonner and Tolhurst (2002) suggest when discussing the ethnographic method of participant observation, "In qualitative studies it is increasingly common for researchers to be part of the social group they intend to study.", and Riemer (1977) cited in (Brannick and Coghlan, 2007, p. 66) "argues that rather than neglecting at-hand knowledge or expertise, researchers should turn familiar situations, timely events, or special expertise into objects of study.".

In this study I was already 'native' (Justine, 2007), i.e., an insider before commencing the research and several benefits but also downsides arose from that status, awareness of the benefits and downsides though ultimately helps manage the downsides e.g.,

- Already having a pre-understanding of the organization culture and the way things were done (Gummesson (2000, p. 57) cited in (Brannick and Coghlan, 2007, p. 68)),

- Understanding the language and lexicon of the organization and in particular the CPS Portfolio 'tribe'. So meaning is easier to interpret in the conversations, interviews, and documents, but the downside is that it can reduce my attention during the interpretation process because I may take things for granted. To counter this downside, I would need to be hyper-reflexive about, and throughout, the interpretation process.

- Having an established identity and level of relationship between the researcher and participants (Greene, 2014),

- Not needing to alter the daily flow of practitioner practices or praxis (Bonner and Tolhurst, 2002; Justine, 2007), and,

- Easier access to site, participants and primary data (Chavez, 2008).

Importantly "'Insider' research allows the process, rather than the outcome, of practice to be explored" (Bonner and Tolhurst, 2002, p. 9), and as an insider my path to data and access to participants was swift once corporate ethics approval, which took almost a whole year, was granted. I was an accepted part of the Portfolio 'tribe' with established relationships (though I needed to establish my researcher 'other self' with the participants, so they did not find this 'other' me threatening) and, as a result more sensitive (and as non-critical or opinionated) to what I was hearing and observing.

As an insider, I already understood when and where to gather data, what the routines, practices and daily praxis were and how the organization functioned, along with its corporate strategies and the internal politics in play. This existing knowledge allowed for the capture of

rich and focused data as well as allowing me to surface the elemental tensions of the portfolio strategy conveyance process at work. It also allowed me to develop propositions relating to the spaces and tensions inherent within the strategy conveyance process, noting that there was always the risk I may jump to conclusions due to my privileged insider status.

However, had I been an external researcher (outsider), I would have expended excessive time gaining access, making sense of the organization and its processes, attempting to identify and then build trust with participants (Bonner and Tolhurst, 2002), and may not have been able to access the deeper meaning of the data.

There are issues with being an 'insider' other than access and organizational knowledge, such as the potential to take for granted known practices or a failure to recognize important patterns due to their familiarity, as Hammersley and Atkinson (2007, p. 87) suggest "Not only may the task of analysis be abandoned in favour of the joys of participation, but also, even where retained, bias may arise from 'overrapport'."

Further, Gerrish (1997) citing (Bonner and Tolhurst, 2002) warns "there was a risk that over-familiarisation with the setting might lead me to make assumptions about what I was observing without necessarily seeking clarification for the rationale underpinning particular actions", and as a result drove the need for researcher reflection, a stepping back to ask questions about the data, and constant checking back with participants.

So, the pros and cons of insider research are many and varied and as such need the application of both a reflective and reflexive approach to data gathering, analysis and making sure to let the data 'speak'. In summary:

- Pro: Pre-existing knowledge of the research context, norms, language etc. (Bell, 2005),
- Pro: Interaction is more natural and knowing how to approach participants is understood (Bell, 2005),
- Pro: The potential for easier access to the site/participants than outsider researcher, though this is not always the case (Greene, 2014),
- Pro: An insider researcher may possibly be more incisive in the selection of sample due to their existing knowledge and organizational experience,
- Con: Given the subjective involvement of the insider researcher and member knowledge its suggested that "the perception of the insider researcher is narrowed" (Greene, 2014, p. 4),
- Con: "The insider researcher is frequently accused of being inherently biased" due to their closeness to the organization and its culture (Greene, 2014, p. 4).

The aim then of the insider researcher, is to see both worlds at the same time, notice the similarities and the differences, recognize the potential for bias and actively practice reflexivity (Greene, 2014).

Prior to entering the field of study, I took time to consider what issues and challenges I might face at each stage of the study (Figure 3-4). I continued to update my thoughts about issues and challenges of being an insider researcher as I progressed through the study (Figure 3-5), and ultimately applied strategies (sub-section 3.6.2.1) to lessen the challenges I faced.
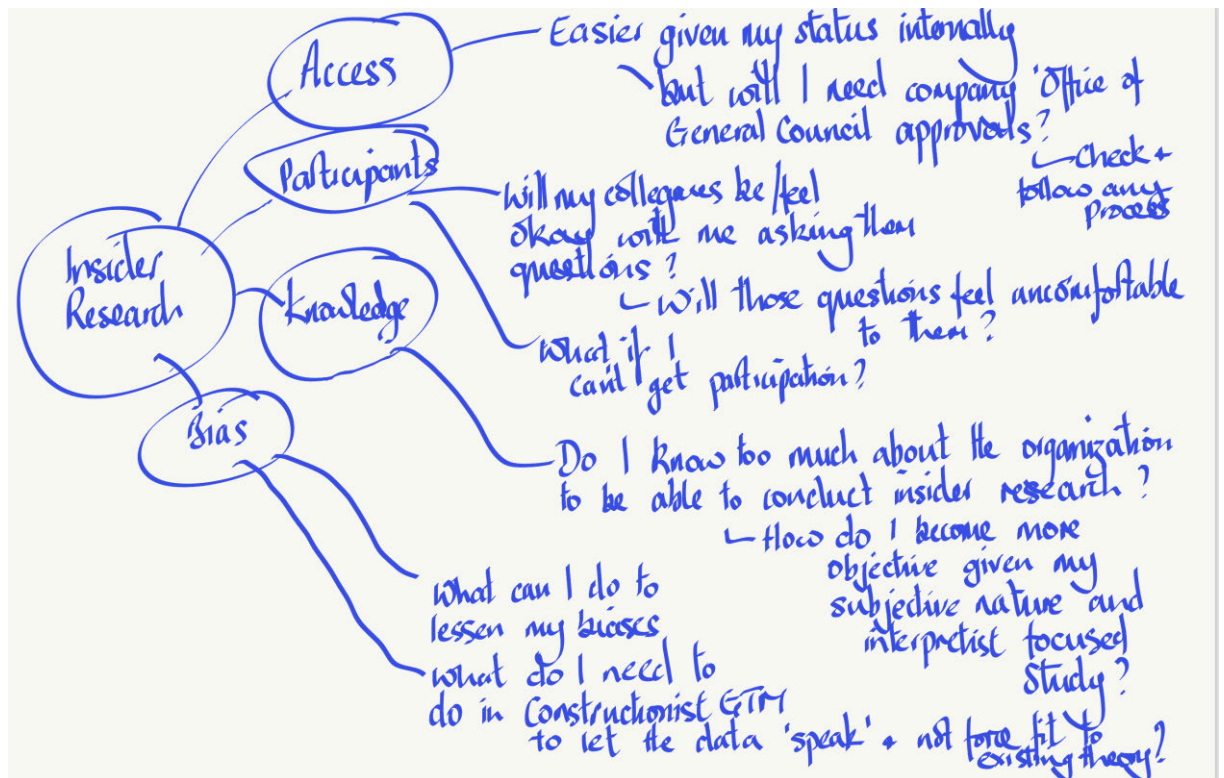
Figure 3-4: Thinking about the issue and challenges of insider research (1)

Access — Finally gained access after almost 12months! Phew!!

Insider research

Participants — Need to think through my sampling approach.
— Maybe the way I ask questions can be altered to be more open so my participants are less concerned?
— Look at 'Clean' language
Make sure I have concents from each participant + that I've explained the study + their part really well...

Knowledge
Go deeper on constructionist GTM and approaches to lessen challenges + biases
— Review Charmaz (2006) in depth.

Bias — What else can I use as data other than interviews?
↳ Observation? Have myself interviewed?
Have organization select the strategy conveyance texts for me so I don't select ones!
Coding — be careful to member check as codes raise up/appear
memo rigorously
Keep up informal chats to help my own sensemaking as I go through this process.

Figure 3-5: Revisiting issues and continued thinking about challenges of insider research (2)

3.6.2.1 Strategies used to cope with being an insider

To lessen the potential effects of being an 'insider' researcher, I applied several approaches such as:

- GTM memoing (e.g., Memo 1), as a way to capture thoughts, ask questions of myself and the data I was capturing (Charmaz, 2006),

- The practice of reflexivity as Johnson and Duberley (2003, p. 1279) state "in order to understand ourselves as management researchers we must engage with ourselves by thinking about our own thinking.",

- Having myself interviewed in order to make my own tacit assumptions explicit (Heugten, 2004),

- Checking back with participants (Maitlis and Lawrence, 2007),

- Conducting informal conversations to validate my thinking and check if themes resonated,

- Gathered multiple forms of data via different methods (interviews, conversations, participant observation and primary texts).

Memo 1: Insider Researcher

Conversational Partner-5, Interview-1, May 2014

Conversational Partner-5 is actually me, the researcher. I had a Regional Portfolio peer interview me based on the same set of open-ended questions I used with my peer conversational partners.

Odd experience, but after the first couple of questions you just don't think about the tape recorder or the fact that the questions being asked are for a piece of academic research, it just feels like another work conversation where someone is asking your opinion or asking questions trying to understand more detail/gain more knowledge.

My peer-interviewer did however ask some follow-on questions that I hadn't thought about which were interesting and gave a new perspective on things.

I did notice that I used metaphors and analogies, plus language that was context specific as we went through the conversation, probably because I was more sensitized to notice them given the previous conversations and transcription process. A researcher from outside the organization, in fact outside the CPS department would struggle to understand much of the context and conversation. I think as it was so jargon heavy and based on a shared-lived previous experience, it makes me wonder how much other researchers miss when going into an alien organization. Likewise, I probably miss things that external researcher might see because I am so embedded within the context.

Even though I applied all these tools and techniques, listed above, to lessen the potential effects of being an 'insider' researcher, ultimately my role within the organization was that of a primary sensegiver. As such it could be argued my capacity to understand the views of the other sensegivers, that I interviewed and observed, was potentially greater than my ability to understand the viewpoints of the sensemakers and thus is a possible limitation of this study.

Having discussed the researcher's philosophy and indigenous-insider position, coupled with both a sensegiver and sensemaker participation/researcher frame, the following section (3.7) summarizes this chapter.

3.7 Summary - Chapter 3

In summary this chapter introduced the philosophical positioning of this study and highlights the importance of those considerations in the study design (section 3.1), then considered and argued for a relativist approach with a social constructionist epistemology consistent with interpretive studies of sensegiving/sensemaking, in order to shed light on the sensegiving/sensemaking process that occurs during the conveyance of strategy practices (Charmaz, 2006; Rouleau, 2005), (section 3.2). The philosophical under-pinning's of each primary academic literature domain pertinent to the study (section 3.3), a brief discussion of other considered methodologies (Action Research Case Study, and Ethnography (section 3.4)), along with a discussion on the evolution of Grounded Theory Method (GTM) (section 3.5), and the ultimate choice to align the study with the Constructionist GTM 'school' as methodology then followed. Finally, section 3.6 discussed the positioning of my researcher as an 'insider' status, the benefits of insider research, and the techniques employed to lessen potential insider bias.

The next chapter (Chapter 4) contains a detailed discussion of the GTM research methodology as applied, the logic of inquiry, sampling strategy, and the research methods for data gathering and analysis employed.

4   GTM applied

"Whatever you think rigor looks like, you should go up a few notches" -Eva Moskowitz.

4.1   Introduction and chapter structure

This chapter provides an in-depth view of the methods for data collection and analysis to make transparent the rigour required in theorizing through grounded theory method.

Given my insider status, using an interpretative lens with Grounded Theory Method (GTM), (Glaser and Strauss, 1967; Strauss and Corbin, 1990; Bryant and Charmaz, 2011) as both methodology and research method would aid methodological rigour and force reflection throughout the research process. Effectively as Lansisalmi, Peiro and Kivimaki (2004, p. 249) state, "Grounded Theory puts the researcher in a central role".

This research explores the conveyance of strategy, with a particular focus on the often paradoxical tensions (Smith and Lewis, 2011) that affect the sensegiving and sensemaking of practitioners who develop, launch and maintain marketable service offerings. A qualitative, interpretative research strategy is argued as the most suitable to enable the uncovering of the strategizing practitioner's daily praxis and practices, with "Grounded Theory … highly recommended in organizational research because it produces descriptions of organizational reality, which are easily recognized by the members of the target organization." (Lansisalmi, Peiro and Kivimaki, 2004, p. 243).

GTM, although stated by (Strauss and Corbin, 1990) as having the ability to be utilized in either qualitative or quantitative research strategies, Charmaz proposed a version of GTM founded on a philosophical basis of social constructionism and recommends that at each stage of the research journey "*your* readings of your work guide your next moves" (Charmaz, 2006, pp. xi, emphasis in original), with the end point of the journey through a combination of involvement and interpretation, being a finished work that the researcher has constructed.

The structure of the remainder of this chapter is as follows:

- Section 4.2 summarizes how this study employed GTM, and discusses the Unit of Analysis (UoA), and logic of inquiry,

- Section 4.3 re-states the research question(s),

- Section 4.4 positions the data gathering,

- Section 4.5 discusses the sampling approaches utilized (purposeful and theoretical), along with an introduction to the study participants,

- Section 4.6 covers the important topic of data management, and details the ethical approvals required (and gained) for the study,

- Section 4.7 focuses on the method used in the first and fourth data gathering phases of the study - the use of Responsive Interviewing (Rubin and Rubin, 2012),

- Section 4.8 focuses on the method used in the second iteration of data gathering - Participant-as-observer with field notes (Kawulich, 2005),

- Section 4.9 focuses on the method used in the third iteration of data gathering - the selection and application of Genre Analysis (Swales, 1990) to the primary IT Portfolio strategy conveyance documents,

- Section 4.10 discusses GTM coding (Initial, Focus, and Theoretical) (Charmaz, 2006), the constant comparison undertaken through the study's data gathering and analysis, and analytical diagramming (Corbin, 2015),

- Section 4.11 discusses the use of GTM memoing (Birks and Mills, 2011), and,

- Section 4.12 summarizes Chapter 4.

4.2 Execution of Grounded Theory Method, and unit of analysis

4.2.1 Execution of GTM

GTM is widely used in both the fields of SAP and Sensemaking (Fenton and Langley, 2011; Rouleau, 2005; Rouleau and Balogun, 2011) given the more often than not interpretative lens applied. It's useful to point out that there is a clear distinction between grounded theory as a methodology and as an applied analytical method.

Suddaby (2006, p. 633) writes of his concern regarding articles using the term "grounded theory" inappropriately e.g., "often used as a rhetorical sleight of hand by authors who are unfamiliar with qualitative research and who wish to avoid close description or illumination of their methods.". Suddaby (2006) goes on to detail six common misconceptions of what Grounded Theory is not and Table 4-1 highlights the mitigations I applied to avoid these pitfalls.

#	Misconceptions of GTM (Suddaby, 2006, p. 639)	Mitigation techniques
1.	An excuse to ignore the literature	The literature is used to contextualise and is returned to later.
2.	Presenting raw data	Several rounds of analysis conducted to saturate the categories and raise the data to a conceptual level.
3.	Theory testing, Content Analysis, or word counts	This study makes no claim to test theory, and whilst some form of textual analysis is applied, it is assumed that words have meaning for the conversational partners and looking at the way that meaning is constructed in the light of paradox is important.
4.	Routine application of formulaic technique to data	The process was iterative and emergent.
5.	Researcher approach to and evaluation of the research	Maintaining a healthy tension between being an insider researcher and an active practitioner through the use of reflection and memoing.
6.	Grounded theory is easy	This study iterated through several rounds of data collection, cross compared all the coding, and made repeated re-evaluations of what was core to the emerging theory, by returning to many different literatures to help with the interpretation. All taking extensive time.

Table 4-1: Mitigations applied to avoid the pitfalls of the common misconceptions of GTM

GTM is not always explicitly stated as applied within studies given the different purposes it can be used for. GTM's use is expressed in many telling ways e.g., as theory building, theory elaboration, framework development, iteration between theory and data, and grounded theory analysis coding methods, i.e., attributions of the process are not the same as following the principles of the methodology rigorously from end to end of the process.

This though is not an issue unique to GTM as the SAP literature also appears to fall foul of this tendency.

The use of GTM as a methodology in this research supports the need for a highly iterative exploration of the research topic within the studied organization. It is consistent with the Social Constructionist approach to GTM (Charmaz, 2006; Kjaergaard, 2009) which acknowledges the entwined role of the researcher in the research. Social Constructionist grounded theory acknowledges that understanding of complex data cannot be neutral and objective but is constructed by the researcher in the process of their understanding." (Charmaz, 2006; Bryant and Charmaz, 2011).

GTM is ideal for uncovering rich sources of data, allowing key themes to emerge related to sensegiving and sensemaking during the conveyance of IT portfolio strategy along with those tensions that affect practitioner actions. By following an iterative GTM approach (both methodology and methods), and allowing those themes to emerge (Glaser and Strauss, 1967) the research will be better positioned for the development of theory.

Additionally, adopting a GTM approach allowed for the 'checking back' (Maitlis and Lawrence, 2007) with the study participants who acted as conversational partners (Rubin and Rubin, 2012) during the data gathering phases to aid refinement and lessen researcher bias.

4.2.2 Unit of analysis

GTM as both a methodology and set of methods does not prescribe a common unit of analysis (UoA). SAP covers from the micro (managerial actions/practices) to the macro (organizations) (Rouleau, 2013) and, sensemaking focuses on either the collective (social and discursive) and/or individuals, their relationships and the process of sensemaking (Maitlis and Christianson, 2014). For this study, however, the primary focus is practices at the interface between middle managers and their offering management staff, which is where interpretation leads to action.

Further, within strategizing and 'doing' of strategy (Jarzabkowski, Balogun and Seidl, 2007, p. 7) there are several possible units of analysis, e.g., practices, praxis, and practitioner, and the relationships between them. What then does it mean for SAP, and in particular, for this study? Effectively it's hard to know what to focus on when there are several possibilities, but as this study is interested in socially constructed tensions, the bridging practices between sensegivers and sensemakers during the conveyance of strategy, therefore practices at the interface were selected as the most appropriate unit of analysis.

4.2.3 Logic of inquiry

Given the constructionist GTM nature of this study, and the focus on building theory, this study lends support to the generation of new management theories that address problems or anomalies encountered in dynamic organizations (Sætre and Van de Ven, 2021).

Charmaz (2014, p. 243) states that "grounded theory begins as inductive and processual.", but also that "the method [GTM] involves abduction as well as induction" (Charmaz, 2014, p. 244). Induction is thought of as an empirical process while abduction is considered a generative process (Sætre and Van de Ven, 2021) by which researchers develop plausible explanations for puzzling findings (Charmaz, 2014).

"In abductive reasoning, the researcher makes inferences as to how to account for the surprising finding and these inferences rely on imaginative ways of reasoning. Then you return to your data and re-examine them, or likely, gather more data to subject your new theoretical interpretations to rigorous empirical scrutiny." (Charmaz, 2014, p. 201).

Abductive reasoning is itself suggested as a sensemaking process involving four iterative steps (observe anomaly, confirm anomaly, generate hunches, and, evaluate hunches) (Sætre and Van de Ven, 2021). These four steps, which operate at both the individual and collective levels, help to articulate the flow of abductive reasoning, providing researchers with the discipline for improving quality and novelty of the theory creation (Sætre and Van de Ven, 2021).

The topic of abduction is continued within the discussion of theoretical sampling below (sub-section 4.5.2), but first a refresher of this study's research question (section 4.3) and introduction to the data gathering and organizational context (section 4.4).

4.3 Research question reminder

The research question is made up of one primary research question (1), and two supplemental questions (2 and 3). The questions are:

1. How do tensions influence IT strategy conveyance between leaders as sensegivers and managers as sensemakers?

2. How, and when, are tensions conveyed through the medium of narratives and texts?

3. How are tensions experienced and become salient for sensegiving leaders and sensemaking managers?

Next is described the data gathering in relation to the organizational context and timeline within which this study was conducted (due to its complex evolution as AcquireCo/RemainCo/SpinCo/NewCo).

4.4 Data gathering and organizational context

Charmaz (2006, pp. 16, emphasis in original) states "The logic of grounded theory guides your *methods of data-gathering*". This study followed this tradition from the sampling selection through qualitative interviews, observation with field notes and primary document collection and analysis (See Chapter 3 for the discussion on GTM).

The data for this research was gathered from the same business unit within the single studied organization AcquireCo/RemainCo/SpinCo/NewCo with the timeline illustrated in Figure 4-1 below, i.e., where the researcher had direct access, through employment at the organization, both on-site face to face and/or remotely via virtual teleconferencing facilities (due to the distributed nature/multiple locations of the conversational partners who informed this study).
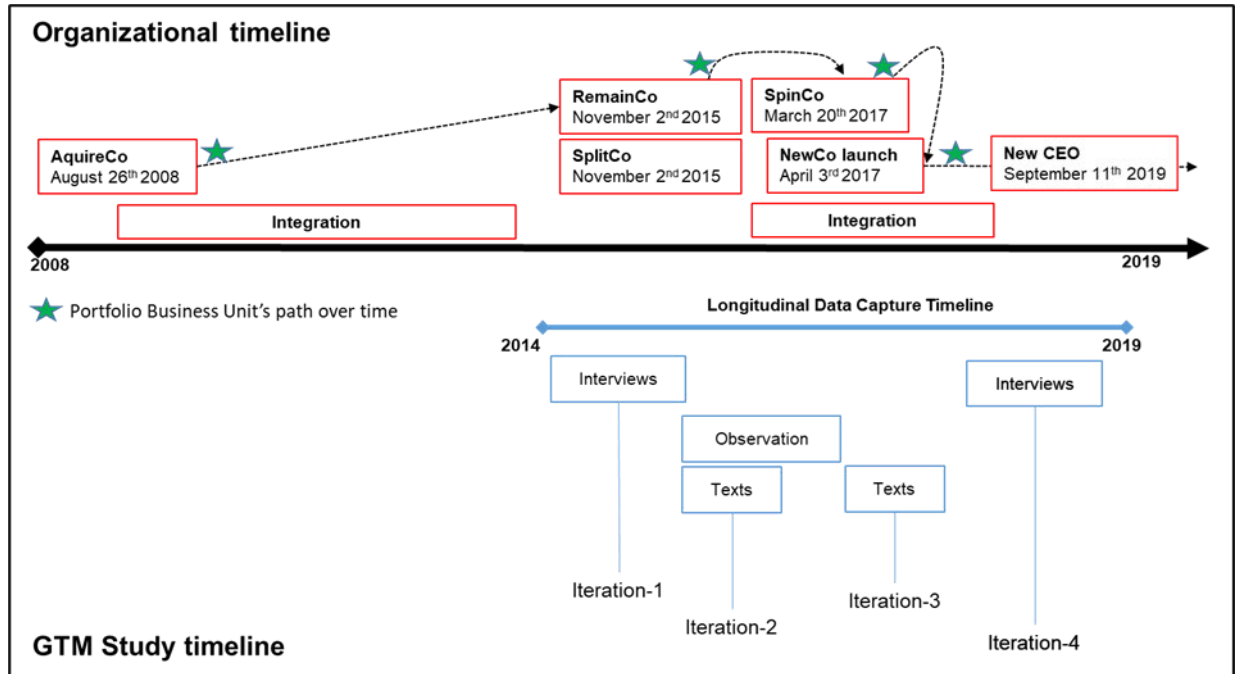
Figure 4-1: Macro-organizational context and timeline

A longitudinal approach (Bryman and Bell, 2003) to the gathering of data took place from 2014 to 2019 with data gathered, checking of interpretation and analysis conducted in four (4) iterations (data capturing events summarised in Table 4-2) as follows:

1. Sensegiver conversational partner responsive interviews (Rubin and Rubin, 2012),

2. Field observation (with researcher as observant participant (Campbell and Lassiter, 2015)) and field notes (Kawulich, 2005) of a 3-day Strategy meeting and strategy texts utilized during the meeting,

3. Primary strategy conveyance document review utilizing Genre Analysis (Swales, 1990), and,

4. Further conversational partner responsive interviews with both:

   a. Sensegivers, and

   b. Sensemakers.

Both informal conversations and follow up interviews were also conducted with the purpose to validate the tensions identified in the earlier phases and explore whether anything was missed.

	Iteration-1	Iteration-2	Iteration-3	Iteration-4a, 4b
Time period	Sept2014-Mar2015	June2015-Oct2016	Jan2017-May2018	Sept2018-Sept2019
Who or what	5xSensegivers (SG)	Strategy conveyance process	4xStrategy texts 1xStrategy session text	5xSensegivers (4a) and 10xSensemakers (SM)(4b)
Mechanism and duration	4 Virtual meetings; 1 Face to Face meeting, all of 1 hour duration and audio recorded. 8 Informal conversations with SGs	Attendance at a 3-day offsite face-to-face Strategy session with 30 attendees (2015). 19 pages of field notes (single spaced) and 178 pages of Microsoft PowerPoint presentation slides. Participation in Extended Leaders meetings (2017-2019). 5 Informal conversations with SG/SMs	5 Primary texts (4 selected by email poll of 60 CPS group practitioners) and 1 text from 3-day Strategy session. Total of 9 pages & 296 presentation slides	10 Virtual meetings of 1 hour duration and audio recorded. 9 Informal conversations with SMs
Method of data gathering	Semi-structured. Conversational partner (CP) interviews (Rubin and Rubin, 2012)	Ethnographic observation (Hammersley and Atkinson, 2007), (Campbell and Lassiter,	Genre analysis of Primary texts spanning 2015-2018 (Swales, 1990)	Semi-structured CP interviews (Rubin and Rubin, 2012)

	2015). Field notes (Emerson, Fretz and Shaw, 2011)			
Analysis method	GTM coding (Charmaz, 2006)	GTM coding (Charmaz, 2006)	GTM coding (Charmaz 2006), and Rhetorical moves analysis (Swales, 1990)	GTM coding (Charmaz, 2006)
Checks or follow-up performed?	Confirmed insights with 4xSG conversational partners	Insights rolled into analysis of key strategy texts and further CP conversations	Confirmed with 5xSG and 8xSMs via email which strategy texts to analyse	Confirmed insights with 1xSG, 2xSMs and one group SM conversation (5xSM)

Table 4-2: Summary of data gathering events

As a point of clarification and even though this research was conducted as a longitudinal study during the period October 2014 through to September 2019 within the context of hyper-organizational upheaval (AcquireCo/RemainCo/SpinCo/NewCo). The Portfolio Offering Management function studied remained constant in responsibility and scope during this macro-organizational evolution. Importantly the CPS business unit under study maintained the same Senior Vice President leader throughout the primary organization's evolution with the predominant strategic direction for the Offering Management function constant. This consistency allowed my continued of access to the conversational partners and primary texts.

Additionally, the participation of multiple CPS portfolio service lines (Figure 4-2) covering all those related to the CPS portfolio were included, thus allowing for comparison during the research process.

Function	VP/Director (Sensegiver) #	Offering Manager (Sensemaker) #
Cross-practice management	1	1
Service Line-1	1	2
Service Line-2	1	-
Service Line-3	1	1
Service Line-4	1	1
Service Line-5	1	2
Service Line-6	-	2
Region (ANZ)	1	1
Total Participants:	7	10
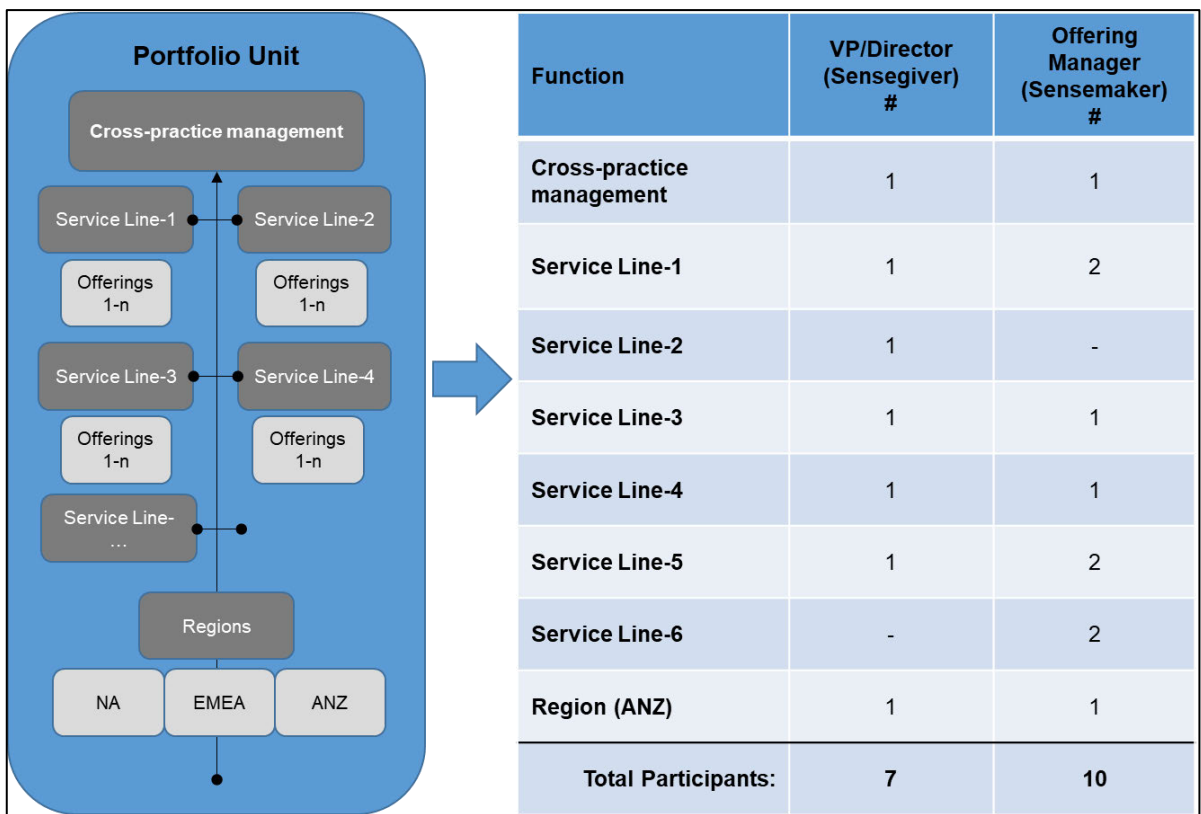
Figure 4-2: Conversational Partner by CPS Service Line

Following Boslaugh, 2007 (cited Birks and Mills, 2011) who distinguishes primary data within GTM as that data which is collected and analysed by the researcher, four forms of primary data were gathered in this study:

1. Responsive interviews (Rubin and Rubin, 2012),

2. Observations (Hammersley, 2002; Hammersley and Atkinson, 2007) with field notes (Emerson, Fretz and Shaw, 2011) and,

3. Strategy narratives and texts (predominantly in the form of PowerPoint presentation files) used in the conveyance of portfolio strategies,

4. Informal conversations with CPS group practitioners to aid thinking and interpretation.

The predominant tool used within the study was that of semi-structured qualitative interviews (King, 2004), using the Responsive Interviewing approach (Rubin and Rubin, 2012), and both observational data and textual documents were also included to increase the richness of data for analysis and to support plausibility.

4.5 Sampling

Given the longitudinal, interpretive focus on an IT companies Portfolio management group, and the dynamic nature of the context and the continuity and change inherent in the strategizing processes, the unit of analysis formed the basis for sampling. I.e., the practices at the interface, this meant sampling the practitioners involved, observing meetings and the reading of the documents that are used in the various conversations at the interface,

Two complimentary approaches to sampling were utilized within this study, firstly purposeful sampling, and then theoretical sampling.

4.5.1 Purposeful sampling and participants

Patton (1990, p. 169) states the "logic and power of purposeful sampling lies in selecting information-rich cases for study 'in depth'. Information-rich cases are those from which one can learn a great deal about issues of central importance to the purpose of the research, thus the term purposeful sampling".

A purposeful sampling of participants (Birks and Mills, 2011) from a population of approximately 60 employees at both Vice President/Director (Service Line/Portfolio Leaders) and Service Offering Management (OM) levels from the World-wide portfolio research and development team within the studied Cloud and Platform Services (CPS) business unit

formed the initial pool of potential conversational partners. Each CPS Service Line and Regional portfolio group were approximately equivalent in staffing numbers due to the similarity of functions performed, and as such the mix of SG and SM participants represented a balanced sample.

The selection of this study's conversational partners was ultimately based on the freely available access I had to a defined pool of Offering Portfolio staff at Vice President / Director level (considered to be sensegivers) and Offering Managers (considered recipient sensemakers). These portfolio employees all reported to Vice Presidents or Directors within the CPS group, who in turn reported to the CPS Senior Vice President.

The recruitment of the conversational partners was made through email invitations (Appendix-A, E) with an appropriate Research Information Sheet (Appendix-B) and the Consent Form (Appendix-C) included in all emails. 17 of the 60 invited Service Line/Portfolio Leaders and Offering Managers volunteered to participate and were interviewed. Table 4-3 summarizes the sensegiver and sensemaker participation throughout the study's data collection and analysis process which consisted of:

- 17 unique CPs made up of:

    o 7 SGs, and

    o 10 SMs.

- 24 total hours of interviews were conducted and transcribed which produced on average 14 pages of single-spaced transcribed text per interview, resulting in a data set of approximately 336 pages for coding and analysis.

- Observation is covered in section 4.8.

- For details of the sampling of documents see section 4.9.

Conversational Partner (CP)#	Sensegiver or Sensemaker?	Service Line alignment	Interview event	Interview event	Interview event	Interview event
CP1	Sensegiver	SL-1	1	2	3	4
CP2	Sensegiver	SL-3	1	2	3	n/a
CP3	Sensegiver	SL-2	1	2	n/a	n/a

CP4	Sensegiver	SL-4	1	2	3	4
CP5	Sensegiver	X-SL	1	n/a	n/a	n/a
CP6	Sensegiver	SL-5	n/a	n/a	1	n/a
CP7	Sensegiver	Regional	n/a	n/a	1	n/a
CP8	Sensemaker	SL-6	n/a	n/a	1	2
CP9	Sensemaker	X-SL	n/a	n/a	1	n/a
CP10	Sensemaker	SL-3	n/a	n/a	1	2
CP11	Sensemaker	SL-1	n/a	n/a	1	n/a
CP12	Sensemaker	SL-4	n/a	n/a	1	n/a
CP13	Sensemaker	SL-5	n/a	n/a	n/a	1*
CP14	Sensemaker	SL-5	n/a	n/a	n/a	1*
CP15	Sensemaker	SL-1	n/a	n/a	n/a	1*
CP16	Sensemaker	SL-6	n/a	n/a	n/a	1*
CP17	Sensemaker	Regional	n/a	n/a	n/a	1*
*- Performed as group interview						

Table 4-3: Conversation Partner (CP) participation

4.5.2 Theoretical sampling

"Theoretical sampling involves a particular form of reasoning, abduction (see sub-section 4.2.3), which distinguishes grounded theory." (Charmaz, 2014, p. 200). Abduction (previously discussed in sub-section 4.2.3) involves drawing inferences from the analysis, and the interpretation takes place in conjunction with the literature. The inferences that come out of the early-stage analysis become the basis for theoretical sampling later, as abduction in grounded theory, is the iterative process where-by a researcher simultaneously collects, codes and analyses data to decide what data to collect next.

In the initial stages of a GTM study, theoretical sampling itself involves the purposeful selection of a sample designed to satisfy theoretical criteria (Coyne, 1997). Then, as Coyne (1997, p. 625) states what happens next depends on "Deciding where to sample next according to the emerging codes and categories [which] is theoretical sampling.". Theoretical sampling, on any category, stops when that category is saturated, detailed and integrated into the emerging theory (Glaser and Strauss, 1967).

Within grounded theory studies, theoretical sampling is recognized as a suitable sampling process and refers to the identification and pursuing of clues arising during analysis within a grounded theory study (Birks and Mills, 2011). As Birks and Mills (2011, p. 11) state " To sample theoretically, the researcher makes a strategic decision about what or who will provide the most information-rich source of data to meet their analytical needs."

Theoretical sampling then is a deliberate, non-random method of sampling that does not claim to represent a population but instead aims to identify information-rich sources that help provide the researcher with insights into what may be going on in order to develop categories or theory further (Bryant and Charmaz, 2011).

Within this study theoretical sampling was employed both in the early and later stages of the research (Bryant and Charmaz, 2011; Charmaz, 2014). The data gathering and analysis in this study was undertaken in 4 phases (see Table 4-1 above), with an early category (Tensions) emergent after phase 1. The category of 'Spaces' emerged after phase 2, and the core category only became completely developed after phase 4 was complete.

Theoretical sampling was ultimately applied as a strategy to narrow my focus on those emerging categories (Charmaz, 2014) throughout the further returns to the data, analysis, member-checking, and constant comparison (Strauss and Corbin, 1990) necessary to reach category saturation[13].

In the next section (4.6) I summarize how the data of this study were managed and the ethics approvals granted.

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[13] Theoretical saturation: The point at which gathering more data about a theoretical category fails to illicit any further insights or properties (Charmaz, 2006).

4.6 Data management and ethical approvals

4.6.1 Data management

Throughout the study both the University of Reading's policy of researcher data management was always adhered to with data held securely, and additional to this the corporate data privacy regulation of AcquireCo/SpinCo/NewCo were also maintained throughout the study period.

All conversational partners were allocated a unique and anonymized identifier to ensure confidentiality. No research data were stored on AcquireCo/SpinCo/NewCo corporate devices, accessed by, or provided to the organization at any point during or after the study. Conversational Partner personal details used for contact and consent purposes (Name, gender identification, email address, corporate role/level) were kept in a password protected Microsoft Excel file, again on a password-protected computer, which when not in use was locked into a safe.

Interview data were transcribed verbatim either directly by the researcher or a professional transcription service (with a confidentiality clause in place), and data were stored on an encrypted and password-protected computer with access restricted to this researcher.

Additional onsite interactions (the 3-day observation of a Strategy conveyance meeting and some informal conversations) were recorded as field notes, as written accounts of the interactions during the meeting and GTM-memos again stored on the researcher's password-protected computer, with backup copies stored on an encrypted backup device secured in a locked safe when not in use.

All information obtained was retained and managed according to the Data Protection Act (1989), later European Union GDPR and the University of Reading research data storage policy, with data used only for the declared purpose of this study; all personal details of participants will be destroyed on completion of this study and the award of the degree.

4.6.2 Ethical approvals

This study was granted approval (29th September 2015) by, and adhered to, the Henley Business School, University of Reading Ethics Committee requirements while simultaneously adhering to the researched organizations corporate Ethics and Compliance Policies.

All study participants were asked to give their explicit and informed consent (Information sheet, Appendix B) as suggested by Bryman and Bell (2003); Remenyi et al., (2010), and

Easterby-Smith, Thorpe and Jackson (2012) for all data gathered throughout the study and for any direct (participant anonymity preserved), quotations used within this thesis.

Additionally, two other forms of approval and consent were obtained, firstly the researcher requested and received (8th October 2015) from their immediate organizational superior (Senior Vice President level) on behalf of AcquireCo/SpinCo/NewCo corporate approval to conduct the full study research within the organization, and secondly, from the business units European, Middle East and Africa (EMEA) divisional Director consent to observe, as a participant, the 3-day Strategy meeting.

Following (section 4.7) I articulate each method applied to gather and analyse data based on the four iterations previously summarized in Table 4-1 above.

4.7 Iterations-1 and 4: Responsive interviewing

The nature of this study was grounded in theories of sensemaking which made it a priority to understand the meaning that the participants gave to and took from the words, actions, and artefacts in their context. As an inductive and abductive methodology GTM demands that the researcher develop their findings from the ground up without preconceptions but with some structure to guide the investigation. The method chosen and considered justified, for the interviews, was that of responsive interviewing (Rubin and Rubin, 2012). Responsive interviewing offered enough flexibility to follow the participants narrative whilst still retaining some direction and focus associated with essential factors of interest, e.g., the tensions encountered and negotiated through the strategy conveyance practices/process, and the affect those tensions had (or not) on the participants sensemaking.

Responsive interviewing is an approach to in-depth interviewing, "because researchers respond to and then ask further questions about what they hear" (Rubin and Rubin, 2012, p. xv). Rubin and Rubin emphasize the importance of developing and maintaining an ongoing relationship with interviewees who they term "conversational partners", a term showing respect and the mutual nature of the co-construction during the interview conversation, i.e., both the researcher and interviewee play an active part in the conversation, and as such a useful tool to an inside-researcher.

The philosophical approach of responsive interviewing aligns well with the Social Constructionist lens. Responsive interviewing is underpinned by a naturalistic and social constructionist approach to qualitative research (Gergen, 2015) and focuses on how people

perceive their worlds and interpret their experiences. This form of interviewing was therefore considered the most appropriate for this research context.

All conversational (responsive) interviews conducted with both sensegivers and sensemakers took the form of semi-structured interviews. These conversations were supported with interview guides (Appendices D, F, G) acting as prompts and signposts to the researcher. All questions posed during the conversations used the techniques of clean language (Sullivan and Rees, 2008), in the form of open-ended questions.

Two iterations of conversational interviews were conducted during the study, the first (Iteration-1), with sensegivers only, during March-May 2014 and the second (Iteration-4) with both sensegivers (4a) and sensemakers (4b) through the period September 2017 to October 2019. Informal conversations supplemented the data gathering and analysis process throughout the life of the study and were invaluable in keeping continuity throughout the gap between the conversational interviews that occurred while the observations and analysis of strategy-texts were conducted.

The purpose of the conversational (responsive) interviews conducted in Iteration-1 with sensegivers was that of context-setting, as an initial exploration of the topic.

The subsequent conversations with the sensegivers and sensemakers were conducted in two stages, September-October 2017 (exploring further) and September-October 2019 discussing the theoretical framework for validation (member checking/participant validation, (Birt *et al.*, 2016)).

4.8 Iteration-2: Participant observation with field notes

Kawulich (2005) suggests that the use of participant observation, as opposed to just observation, provides more insights. Paul (1953) (cited DeWalt and DeWalt, 2011, p. 28) states "Participation implies emotional involvement; observation requires detachment.". This involvement and detachment are said to allow the researcher access to otherwise 'hidden' events/activities, and to capture and create rich descriptions, and improves the quality of data captured due to the direct interaction with the participants and reflexive questioning ability (DeWalt and DeWalt, 2011).

Generically, observational methods provide the researcher with ways of not just capturing raw data but also allow the researcher to determine who interacts with who, how members of the group/culture communicate, record how much time is spent on activities, understand

what activities appear to have potentially greater value to participants and a way to check for non-verbal expressed feelings (Schmuck, 1997 cited (Kawulich, 2005)).

Added to this, Gold, 1958 cited (Kawulich, 2005) describes four fieldwork observational researcher stances (complete participant, participant-as-observer, observer-as-participant, and complete observer). The stance chosen for this study, i.e., participant-as-observer (Burgess, 1984 cited (Waddington, 2012)), meant I as the researcher, participated in group activities with the group aware of the observational activities, but ultimately my primary goal was the collection of data.

One limitation of note when using participant observation is that of researcher bias. Each researcher brings their own experience, opinions, feelings, and knowledge to the field of study and each of these will influence how that researcher designs their study, conducts observations, and subsequently performs the analysis and interpretation. A researcher who is sympathetic to a group's 'cause' or a researcher researching in the site of their own practice, as was the case in this study, needs to be aware of the bias they bring to the field of study. To counter this bias there is a need to constantly reflect and weigh up the data, or lack of it leading to theoretical sampling, against the insights the literature provides.

No social research can be truly objective and ethnographic observation as a method is more strongly associated with an interpretive lens and tends towards subjectivity. Even if multiple researchers observe the same event, each researcher will observe based on their own experience, so even two researchers observing the same event will not be able to reproduce the exact same account of that observed event (DeWalt and DeWalt, 2011).

Recognizing that researcher biases would exist within this study was important, as was making note of any potential biases throughout the creation of field notes. These field notes were considered and reflected upon. The interpretation was also checked with participants via informal conversations, making sure the field notes were more accurate and believable. Ultimately though, observations in social science research are subjective and thus biased in some way (DeWalt and DeWalt, 2011).

With this observational stance defined and researcher bias noted, participation in a 3-day off-site strategy conveyance meeting during September 2015 occurred, with extensive field notes taken (Emerson, Fretz and Shaw, 2011). Data gathering was predominantly unstructured and aligned to the GTM stance of 'letting things emerge'. As a researcher in site of their own practice there was no culture shock to deal with, no trust of those being observed to gain and the context was well known. However, I needed to reflect and member

check regularly via formal follow-up conversations, and informal ad hoc conversations to lessen any assumption bias.

Table 4-4 summarizes how the ethnographic observations were conducted and subsequently analysed within this study.

	Where, Who and Methods
Location	In-person 3-Day Strategy meeting, Netherlands
Participants	30+ Regional Service Line related staff
Data Collection	Field Notes (Emerson, Fretz and Shaw, 2011); PowerPoint presentation material presented during 3-day Strategy session; Member checking: formal follow-up conversations with CPs in attendance, and informal ad hoc conversations with practitioners
Researcher Stance	Participant Observation/Participant-as-observer (Campbell and Lassiter, 2015; Waddington, 2012)
Analysis Methods	GTM qualitative analysis of Observational Field Note summaries and PowerPoint presentation documents using qualitative social constructionist coding (Charmaz, 2006)

Table 4-4: Summary of how the ethnographic observations were conducted

Consent to observe was obtained prior to the 3-day session (Appendix-H). However, the participants of the 3-day session were not pre-notified of the research or that observation was occurring at the specific request of the Regional-leader/meeting organizer. If meeting participants did question why the researcher was taking copious notes during the meeting, the researcher openly shared the reason and allowed the participants to ask clarification questions that allowed them to feel comfortable that anonymity was being preserved.

At the end of each day of the 3-day strategy conveyance meeting reflection occurred on the field note data captured (Figure 4-3) and then detailed notes were written up soon after observing the day's events, activities and interactions in order to capture vivid pictures of those occurrences (Emerson, Fretz and Shaw, 2011), see Appendix-I for an extract example.

Following the writing of the reflective field notes, qualitative constructionist coding (Charmaz, 2006) was performed on both the field notes and the PowerPoint presentations utilized during the 3-day strategy meeting. Additionally, I conversed with attending practitioners to check key points I had noted during the observation, thus lessening my bias.

	Descriptive	**Reflective**
Metaphors	"X, well yes "*it's a fine line*" were walking and in the process we're "*tying ourselves in knots*" [accompanied by hand gesturing to indicate knot] with all this internally focused stuff and forgetting our clients."	"Spinning circles, almost vicious, infectious in nature. You feel swept along by this constant tide of complaining, as though a necessary rite of passage and allowance to have an opinion."
Perceptions *Codes*	"The use of the "*house slide*". The whole room became alive with questions and comments with the biggest concern raised to the presenter as to whether this slide and its assumed associated journey had been communicated internally rather than externally."	"The participants became highly animated during this discussion around the 'house' slide. Many opinions were shared/voiced. The term 'house' comes from the visual representation. Will need to analyze the 'House' slide potentially as it obviously has meaning within it and has become a gravitational force, potentially having a form of agency even without a narrative accompanying it."
Bias	"The presenter did make the point that this 'interlock' was now driving "*a completely different discussion now*"."	"Imparting time, walk from one point to another and a need for change in behaviours/actions given the transparency of information now available."

Figure 4-3: Example of field note reflection

4.9 Iteration-3: Genre analysis of primary strategy documents

"Much of social life in modern society is mediated by written texts of different kinds." (Peräkylä and Ruusuvuori 2011, p. 529) and "they [texts] create expressive bridges across time and space." (Smith and Turner, 2014, p. 6).

Although constructionist coding was applied to every strategy document analyzed which supported the other forms of iterative data capture and analysis, it was apparent that there was more to be uncovered within the presentation documents given their primacy within the strategy conveyance process.

Texts are often referred to in numerous ways within social research e.g., narrative stories, histories, strategy documents, interview transcripts, ethnographic field notes, Microsoft PowerPoint presentations, Annual reports etc., however, as Fenton and Langley (2011, p. 1182) define a document as a "'text' in its everyday sense as a concrete written document", texts were considered an important component of the conveyance process studied.

Sources of published and internally, ethically accessible strategy related materials as extant texts (Charmaz, 2006), in the form of presentation documents, were examined for their textual/narrative qualities (Boje, 1991; Boje, 1995) using the approach of Genre Analysis (Swales, 1990). Although there are numerous methods that can be used in the analysis of texts (see Appendix-K for methods considered), Genre Analysis was selected due to its focus on communicative purposes and particular audience.

The five primary texts analysed were considered relevant as components of the conveyance process under study and as Swales (1990, p. 58) states "A genre comprises a class of communication events, the members of which share some set of communicative purposes. … exemplars of a genre exhibit various patterns of similarity in terms of structure, style, content and intended audience".

The five strategy texts were composed four 4 CPS practitioner selected texts (Figure 4.4) and the 3-Day Strategy meeting PowerPoint presentation deck. These 5 texts comprised 300 pages in total. These same strategy texts were also used within the responsive interviews conducted to explore the conversational partner's interpretations and gather insights to the consequences of the texts used.

These extant texts also acted to support the necessary data triangulation within the research and aimed to lessen researcher bias during the research process (Remenyi *et al.*, 2010).

All the texts except one (see Figure 4-4 below) within this study were PowerPoint presentations which were used specifically as communication vehicles during the conveyance of portfolio strategy. Microsoft PowerPoint presentations formed the organization's predominant form of communication text throughout the study's timescale. These texts were designed to be shared and cascaded down to the leaders (as sensemakers), so they could then use them as a sensegiving tool when sharing with their own teams.

The working definition of genre is based on four (4) characterizations:

1 – A genre is a class of communication events. Where a communicative event comprises the discourse, participants and the role of the discourse and environment/context on its production and reception. Bhatia (1997, p. 630) also state that genres are "essentially defined in terms of the use of language in conventionalised communicative settings.".

2 – The principal criterial feature that turns a collection of communicative events into a genre is some shared set of communicative purposes. As Swales states, "genres are communicative vehicles for the achievement of goals." (Swales, 1990: pp. 46).

3 – Exemplars or instances of genres vary in their prototypicality. Not only do genres have the feature of communicative purpose, but that each occurrence within a genre may either have a family resemblance and/or a definitional alignment.

4 – The rationale behind a genre establishes constraints on allowable contributions in terms of their content, positioning, and form. The shared set of values associated with a genre will be recognized by those discourse communities that use the said genre to realize their goals.

Kaplan (2011) goes further when evaluating the genre of Strategy-as-Practice documents referred to as 'PowerPoint-genre in use' by suggesting "genres are organizing structures that shape expectations about the purpose (why) and the form (how something is communicated) as well as the content (what), the participants (who), the time (when), and the place (where)." ((Kaplan, 2011, p. 326) after Yates and Orlikowski (2002)).

With Genre Analysis as the underpinning method, the selection of which documents to analyse was the next task. To reduce researcher' bias the selection of which conveyance of strategy documents to analyse was based on direct feedback from an email request (Appendix-J) to thirty-four (34) Portfolio staff on 8th April 2018, asking the following question:

'Which of our many CPS [Cloud and Platform Services, Service Line] documents, in any format, do you consider important when we socialize and/or communicate our strategy?'

Thirteen (13) responses were received, and the resultant feedback highlighted four (4) key documents for analysis (Figure 4-4). For completeness, the 3-Day Strategy meeting consolidated presentation deck was also examined giving a total of five (5) primary texts analysed. Figure 4-5 and Figure 4-6 illustrate two slides that appeared in all the analysed PowerPoint texts i.e., 4 of 5 of the analysed texts.

Question asked on 8/4/18: *"Which of our many CPS documents (in any format) do you consider important when we socialize and/or communicate our strategy?"*

Sense-givers	External focus				Internal focus						
	CIO deck	Advisory Executive conversation deck	Client facing Offering overview docs	Client facing Roadmap deck	FY19 SBP doc & appendix deck	PoR/Pol Roadmap decks	IRB deck	SteerCo deck	Playing to Win decks	Response File No:	Date received
1	x					x				11	10/04/2018
2					x	x	x			9	10/04/2018
3	x	x	x			x				4	09/04/2018
4					x					2	08/04/2018
5	x				x	x				13	30/04/2018

5 Sense-givers responded (14 emailed), 35% response rate)

Sense-makers	External focus				Internal focus						
	CIO deck	Advisory Executive conversation deck	Client facing Offering overview docs	Client facing Roadmap deck	FY19 SBP doc & appendix deck	PoR/Pol Roadmap decks	IRB deck	SteerCo deck	Playing to Win decks	Response File No:	Date received
1	x					x				10	10/04/2018
2										8	10/04/2018
3						x		x		7	09/04/2018
4		x			x	x	x		x	6	09/04/2018
5	x				x	x				5	09/04/2018
6						x				3	09/04/2018
7				x		x				1	08/04/2018
8	x									12	16/04/2018

8 Sense-makers responded (20 emailed, 40% response rate)

TOTALS											
13 responses	6	1	2	1	5	10	2	1	1		

2   3,4   1*

KEY:
1, 2, 4 – MS PowerPoint format
3 – MS Word format
* - Associated audio file available

Figure 4-4: Identification of key strategy conveyance documents to perform analysis (Genre and GTM coding) against

Note: Figure redacted for confidentiality.

Figure 4-5: The 'Playing to Win' slide within the 3-Day Strategy meeting consolidated presentation deck

Note: Figure redacted for confidentiality.

Figure 4-6: The 'House' slide within the 3-Day Strategy meeting consolidated presentation deck

In relation to the Genre analysis performed, four (4) avenues of analysis were considered in relation to the texts analysed, and its application is illustrated in Table 4-5:

1. the schematic structure within the texts (e.g., intro, body, ending), (Swales (1990); (Bonyadi, A. (2012); (Eisenhardt and Roscoe (2016)),

2. what interrelated conventions of recurrence of rhetorical situations were context driven, known as rhetorical moves (Swales (1990); Bhatia, V. K. (1997); Bonyadi, A. (2012); (Eisenhardt and Roscoe (2016)) within the texts,

3. what shared communicative purpose (embedded within the context) (Bhatia, V. K. (1997)) the text had, and,

4. the regularities of structural organization (lexico-grammar) (Bhatia, V. K. (1997)) within the texts.

Genre characteristics[1]	PowerPoint genre-in-use[2]	Expectations of purpose[3]	Strategy conveyance event	Multiple purposes within the PowerPoint deck
a class of communication events	Making and giving sense; Communication genre-in-use	Why	Share with and enable regional leaders to understand and align to the worldwide and EMEA organizational strategy	"FY16 Growth Summit", "Opportunity and Challenges", "Business Transformation"
some shared set of communicative purposes	Convey current position, future direction, and organizational context	How	3-day off-site physical meeting. 30 participants attending over 3-day duration; Gain 'buy-in'	"Meeting purpose and objectives", "Looking ahead to FY16", "Financial targets and Sales plan", "Lowlights", "ROI", "Competitors", "Highlights"

have a family resemblance and/or a definitional alignment	Vision, goals, direction, market position/size, benefits	What	Series of strategy presentations, activities, discussions and sharing	"The Strategic Vision", "Playing to Win Strategy", "journey to cloud and current vision-SWOT", "Solutions for a New Style of business"
shared set of values associated with a genre will be recognized	Provided space to make compelling argument	Who	WW, EMEA and Regional L4 and L5 leaders	"Go to Market focus", "ACT-Action changes things", "The essence of the solution is changing", "Strategy for Action"
		When and where	1st-3rd Sept. 2016. Organizations office conference room, Amstelveen, Netherlands	
1 – Swales, (1990), 2 & 3 - Kaplan, (2011)				

Table 4-5: Genre analysis applied to the 3-Day Strategy meeting conveyance document

This chapter now moves on to discuss the use of GTM coding, diagramming, and memoing as the foundational analytical mechanisms within the study.

4.10 GTM coding

Coding is the process of applying labels to excerpts of data where "Coding means categorizing segments of data with a short name that simultaneously summarizes and accounts for each piece of data." (Charmaz, 2006, p. 43). This allows the identification,

selection, and sorting[14] of the data into something more manageable that iteratively guides the next data gathering and analysis phase, and ultimately, enables the grouping of initial codes into focused codes and then finally, categories. Staying true to Constructionist GTM coding principles (Charmaz, 2006), the following coding process was utilized, Table 4-6, with the coding process managed using the AtlasTi software package.

Process level / coding stage	Type of coding	Description of coding	Focus of coding stage
1	Initial	Coding using gerunds to highlight activities and processes; Use of conversational partner language as 'in-vivo' codes; Coding of words, lines, phrases, metaphors, actions, feelings (Charmaz, 2006)	Looking for the interesting and potentially emergent elements; Asking questions of the data (Birks and Mills, 2011). What stood out at this stage were the sheer number of metaphors, and the number of different words used to imply tensions (challenges, issues, roadblocks, impacts, ambiguity, etc.)
2	Focused	Used to sift through extensive amounts of data (357 initial codes), beginning to focus on the apparently significant, similar and/or frequent codes; Compare data with data, interview with interview, text with text; Compare initial codes for similarities and differences (Charmaz, 2006)	Make "decisions about which initial codes make most analytical sense to categorize your data incisively and completely." (Charmaz, 2006, p. 57) Allow the categories to emerge and solidify Attain a state of theoretical saturation (Glaser and

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[14] Theoretical sorting of memos and diagrams aids the finalization of the integration of categories (Strauss and Corbin, 1990).

			Strauss, 1967; Strauss and Corbin, 1990)
3	Axial	Not utilized, as Charmaz (2006, p. 61) states "Those who prefer simple, flexible guidelines-and can tolerate ambiguity-do not need to do axial coding."	
4a	Theoretical	Begin to conceptualize how the sub-categories and focused codes relate to each other to form propositions that can be integrated into theory through memoing, sorting and diagramming (Strauss and Corbin, 1990)	Integrate and elaborate on the emergent theory
4b	Diagramming	Visualize the categories and relationships to illustrate the theoretical linkage between the categories (Strauss and Corbin, 1990)	Support the integration and elaboration of the emergent theory through visual means

Table 4-6: Constructionist coding process as applied

4.10.1   Initial coding

Initial coding is the starting stage in analysing the gathered data, and as Saldana (2013, p. 3) suggests "A code in qualitative inquiry is most often a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute to a portion of language-based or visual data." During initial coding, the data is analysed line-by-line to allow the greatest theoretical coverage, with codes provisionally labelled, and often taken directly from participant's language in the form of in-vivo codes.

Also, in the case of Constructionist GTM, there is focus on speed to ignite thinking and, gerunds (activity related words ending in 'ing') to keep the researcher close to the data, "We gain a strong sense of action and sequence with gerunds." (Charmaz, 2006, p. 49), Table 4-7 illustrates an example set of gerund codes from this study and their potential to proxy for practices (Thomas, Sargent and Hardy, 2011).

Initial codes	Occurrence	Data
ALIGNING	CP3; CP4	"need to align their thinking around" [CP3]
ASKING	CP1	"you know asking them for their view and perspective" [CP1]
CASCADING	CP5	"The leaders within the … organization are supposed to cascade this information" [CP5]
COMMUNICATING	CP1; CP2; CP3; CP4; CP5	"you know in terms of starting to communicate that to the team" [CP1]
CONNECTING	CP4	"as we build our strategies out the … managers are an integral part of that" [CP4]
DIRECTING	CP1	"seven or eight points I would say I mean which give direction so you know" [CP1]
FOCUSING AND PRIORITIZING	CP1; CP2	"what do we see as the most impactful" [CP1]
FOLLOWING	CP2; CP5	"not everybody has the time to follow every mail and watch every video" [CP5]
INTERACTING	CP4	"give them not just the nuts and bolts of what we're doing but give them some view of the strategy going forward" [CP4]
KNOWING	CP1; CP4	"let them see and know and feel where we're going" [CP4]
LOOKING	CP1	"what are the specific things about my, my area" [CP1]
MAKING SENSE	CP3; CP4; CP5	"I think part of my role is to navigate that, figure out what those messages are, interpret that direction for the team and then give them direct guidance" [CP3]

QUESTIONING	CP5	"then obviously you do have the ability to ask questions to try, to try and take more understanding" [CP5]
SEEING AND SENSING	CP1; CP2; CP4	"When you, you start to see" [CP2]
SENDING AND RECEIVING	CP1; CP3; CP4; CP5	"So I get presentations delivered [pause] err, to me" [CP3]
SHARING	CP1	"share those umm plans and thoughts about how we want to move forward with those organizations" [CP1]
SUPPORTING	CP2	"it reinforced that a lot" [CP2
TALKING	CP1; CP2; CP3; CP4	"I've talked about [it] with my team" [CP2]
TELLING	CP1; CP2	"they're not going to tell me and oh and by the way" [CP1]
UNDERSTANDING	CP1; CP2; CP4; CP5	"they need to understand enough, and they need to understand the big areas" [CP2]

Table 4-7: Example: Use of gerunds (as potential proxies for practices) in nascent initial coding

The initial labels were generally descriptive, summarizing the action in more concise words, with gerunds acting as the predominant feature of the initial coding, and were derived directly from the language of the conversational partners (Table 4-7) to capture and place emphasis on those topics meaningful to them (Charmaz, 2006). As early patterns/themes emerged from the data, I revisited the audio recordings, interview transcriptions, field notes and primary documents to ensure the analysis stayed true to the data. By returning to these original sources of data I was able to check my initial assumptions, challenge the coding and aimed to lessen my insider-bias (Strauss and Corbin, 1990).

These initial codes were subjected to constant revision through the process of constant comparison (Corbin, 2015) but allowed me to move quickly to open up the data to expose possible early concepts and analytical categories (Birks and Mills, 2011). As Figure 4-7 shows the early initial codes were a heavy combination of In vivo codes and gerunds, with little grouping occurring to reduce the data quantity.

Code-Filter: All	Engaging	communication
	Evaluating	Seeing and Sensing
	Facilitated Sense-giving	Sending and Receiving
	Fixating on perfection	Series of situational
Initial Coding	Focusing and Prioritizing	statements
1st pass	Following	Setting
	Forcing	Sharing
	Gaining commitment	ships passing in the night
	Giving	Simplifying
	go back to the drawing board	So atomic
'bring me a rock'	Harmony	Solving for strategies
a bunch of processes	hit the edge	Speed
a footprint	Hitting each group	stands us apart
a light at the end of the	Hitting on ideas	starting to see the
tunn..	hitting the right spot	foundation..
a lot of ground for us to	Hoping for consistency of	Strategy process
cove..	message	Structure
a method to the madness,	how that fits in this overall ..	Supporting credibility of
Above and Below	Identifying opportunities	strategies
Aligning	if it's one of the good	Tactics
all these other things that	answer..	Talking with others
do..	In the middle	Telling
Asking	Interacting	Tensions
Assessing	Knowing	Textual artefacts
balancing act	Leadership team	there's, no stick or carrot! T..
basic building blocks	Light-bulb moment	Thinking
Being	listen and contribute	throw a blanket over
Being in tune	Locating-Context	Time
being more strategic	Looking	Tools of communication
Bi-directional	Making sense	Training others
big rocks	Meetings becoming an	trap that we fall into
big themes	imperative	Trying
Cascading	more of an art form than	Understanding
Choices and Decisions	scien..	Vision
Circling back	Myriad of things presented	Visual
Clarity and Ambiguity	Needing	Wanting
collaboration	organizational capabilities	we try to put everything into
Communicating	past experience and	
Comparing R&D efforts	knowledge	
Compelling	Performing	
Competing	Perspectives	
complex conversation	Planning	
complexity angle	Playing to Win	
concrete kites	Positioning	
Connecting with a strategy	put a stake in the ground	
mechanism	Puzzle pieces	
crank the handle	Questioning	
Creating, Building and	real golden nuggets	
Constructing	really dive into it	
Current offerings	Reflecting	
Deciding what to develop	Repetitive sense-giving	
Demonstrating capability	Reporting just what has	
Describing what we do	changed	
Designing	Responsibility	
Dimensions	Reusing from the past	
Direction	Ripples and Resonance	
Driving	roadblocks	
Email loosing effectiveness	Sea of continuous	

Figure 4-7: Early initial codes

Initial coding is considered a reflexive activity where "the researcher needs to constantly interrogate themselves about the early analytical decisions they make." (Birks and Mills, 2011, p. 95) to support the development of theoretical sensitivity (Birks and Mills, 2011). By asking questions, not force-fitting pre-conceived ideas on the data and focusing on the development of analytical categories and the relationships between those categories leads to

a richer and more theoretically sound outcome. As Strauss and Corbin (1990, p. 42) state "It is theoretical sensitivity that allows one to develop theory that is grounded, conceptually dense, and well-integrated". Step 1 in the process of abduction (Sætre and Van de Ven, 2021) plays a large part here as the researcher needs to be attentive to the early signs of puzzles or anomalies. In support of this the researcher needs to pay attention to possible divergent views, while also increasing their depth in diverse literatures which may provide insights.

As coding progressed, the use of the colour coding function in the AtlasTi software tool became useful to me, allowing the early rationalizing and grouping of codes (Figure 4.8).

Figure 4-8: Example of early-stage refinement of the initial coding table through grouping

Revisiting the data and initial coding table with each iteration of data gathering and analysis resulted in addition of new codes that captured multiple perspectives and meaning (Charmaz, 2006). The use of AtlasTi software allowed large amounts of data to be synthesized and reduced into action related descriptors, helping with the comparison of data with data, and code with code. This process of initial code revision (through iterations of data gathering, analysis and comparing data with data, events to events, codes with codes, codes to categories and categories to categories is known as the process of constant comparative analysis (Birks and Mills, 2011). This process continued until the initial codes begin to coalesce around stronger analytical directions paving the way for the move into the next part of the Constructionist GTM coding process, i.e., focus coding (Charmaz, 2006) where again constant comparison continued as constant comparison "is a process that continues until a grounded theory is fully integrated." (Birks and Mills, 2011, p. 11).

4.10.2   Focus coding

Charmaz (2006, p. 57) defines focus coding as "using the most significant and/or frequent earlier codes to sift through large amounts of data. Focus coding requires decisions about which initial codes make the most analytical sense to categorize your data incisively and completely."

The beauty of focus coding is that it allows you to check your pre-conceptions about the topic under study (Charmaz, 2006), keeps you close to the data, while allowing movement across interviews and observations that then enables the constant comparison of participants experiences, actions, feelings and interpretations.

In each interview transcript and primary text, I filtered the initial codes and identified those that seemed to appear more frequently (Figure 4.9) and had higher analytical value. These filtered codes were also perceived as more relevant to the research question(s) that other codes (Charmaz, 2014). The intent here was to provide some direction to the development of theoretical categories by synthesizing and analysing large volumes of data in a more conceptual manner. The synthesis was conducted by comparing and then contrasting initial code labels with similarities, revisiting the data by re-reading the narratives and texts, and listening to the audio recordings of the interviews. This resulted in focused codes which represented larger consolidations of data (Charmaz and Mitchell, 2001).
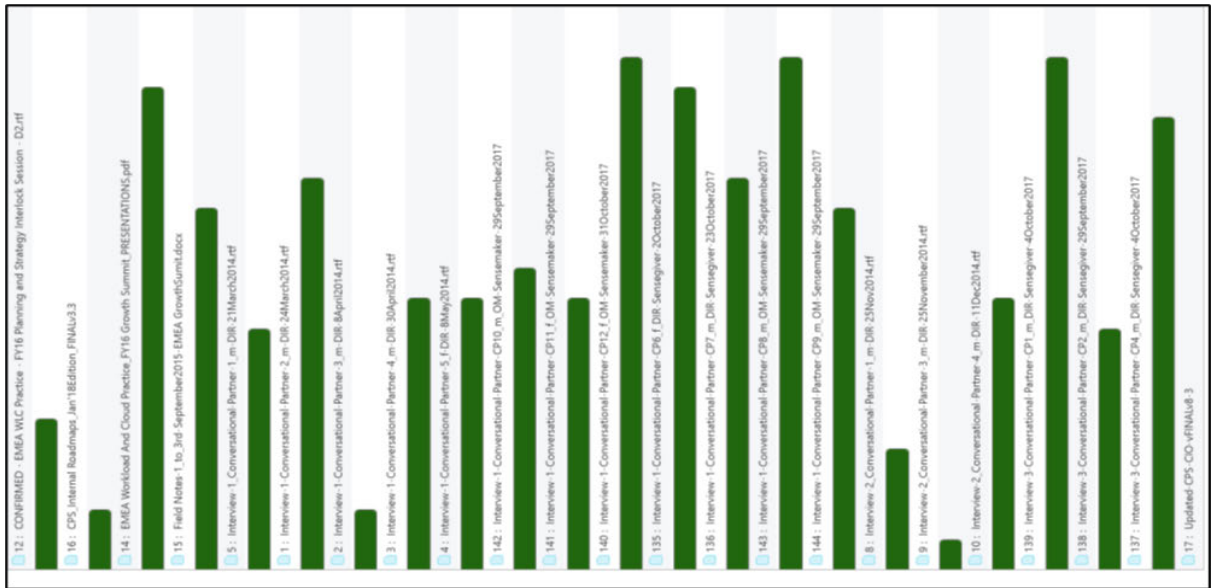
Figure 4-9: Excerpt of coding distribution for focused code: Direction a path to follow
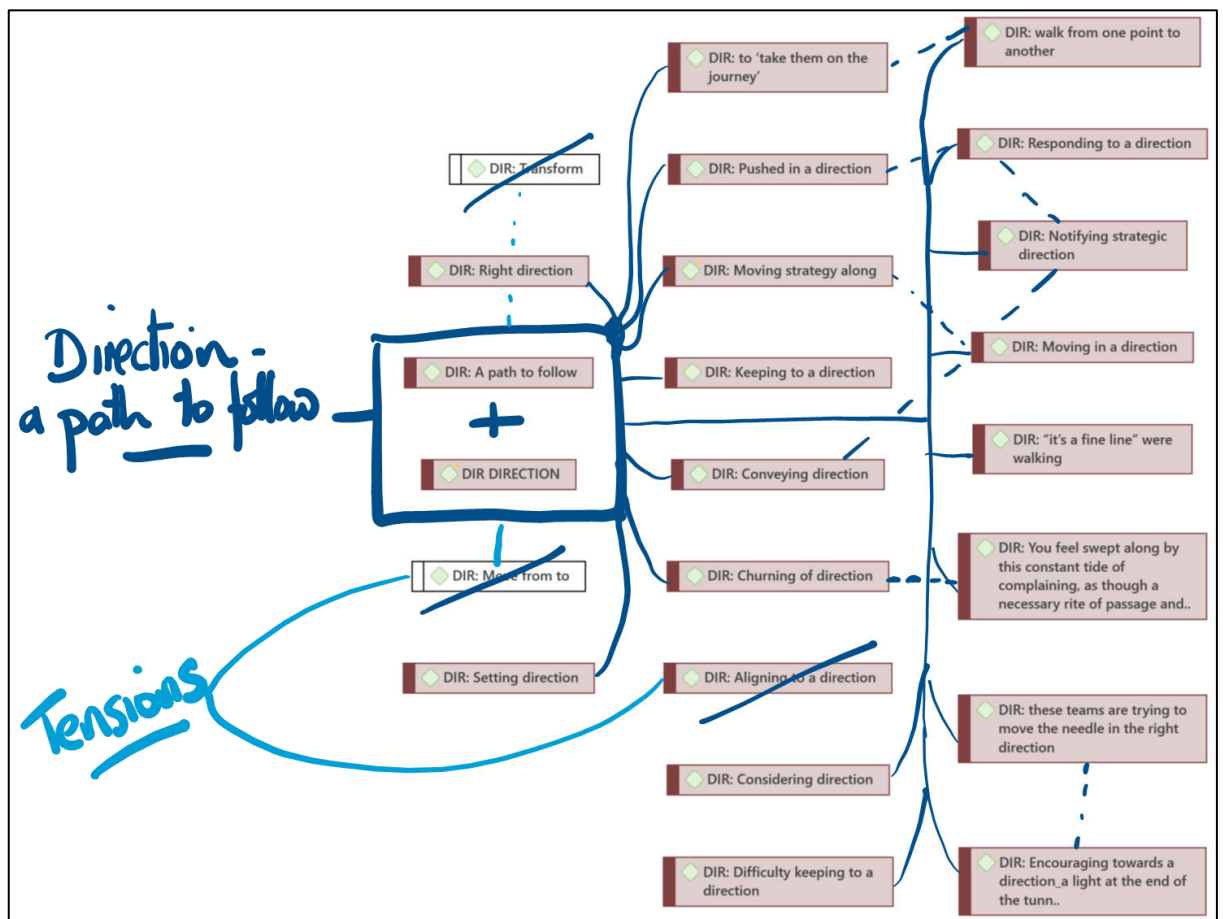
Figure 4-10: Moving towards a focused code: Direction a path to follow

To then deepen each focused code, I sought out what values, conditions, actions, and consequences were associated with an emerging theme. These values, conditions, etc., were not always explicit words, but an interpretation of tacit elements in the narratives and texts, which helped explain how the focused code operated. The result was refined focused codes with depth (Charmaz, 2006), (Figure 4.11).

Focus code	ALG: Aligning	DIR: Direction	USTAND: Understanding
Data	"I think err, sharing information as much as you can, sharing the rationale behind that information is critical so people can get aligned to the purpose." [CP3-SG Interview 1]	"so that everybody's marching in the same direction as soon as practicable." [CP2-SG Interview 1]	"I think there's a real balance in the way that we communicate with you know, being concise enough to get the meaning and, and understand what's happening." [CP5 SG Interview 1]
How the code operates	**Value:** Benefit to all having the same understanding of conveyed information and rationale **Condition:** Readying group for desired aim/purpose **Action:** Sharing information, conveying knowledge **Consequences:** The future purpose has importance	**Value:** Benefit to having everyone moving along the same pathway **Condition:** Conveying the direction everyone needs to move in **Action:** Conveying the signposts that guide action **Consequences:** Timing of action relevant	**Value:** Simplified messages to aid OM's sensemaking **Condition:** Helping OM's understand information and internalize as knowledge **Action:** Conveying messages for meaning **Consequences:** Overly complex communication could confuse OM's and cause unexpected actions

Figure 4-11: Example of deepening the focused codes

This flexible way of working and doing what I considered sensible through the focus coding process, I sometimes left the initial codes intact; sometimes several codes under one; and sometimes coded the initial codes as focused codes. Consistent with constructionist grounded theory, this stage allowed me to merge elements of induction, deduction and verification through the use of constant comparative analysis, aiding my analysis (Birks and Mills, 2011).

This moving back and forth in the data, through the process of constant comparative analysis, constantly comparing the focused codes and revisiting the transcriptions again (Figure 4-12), helped me to reflect on each focused code and which were a more representative of what was happening in the data. The focused codes that appeared a more accurate reflection synthesized multiple layers of meaning and actions and judged to be of conceptual value (Charmaz, 2006), I then raised to early sub-categories and/or categories.
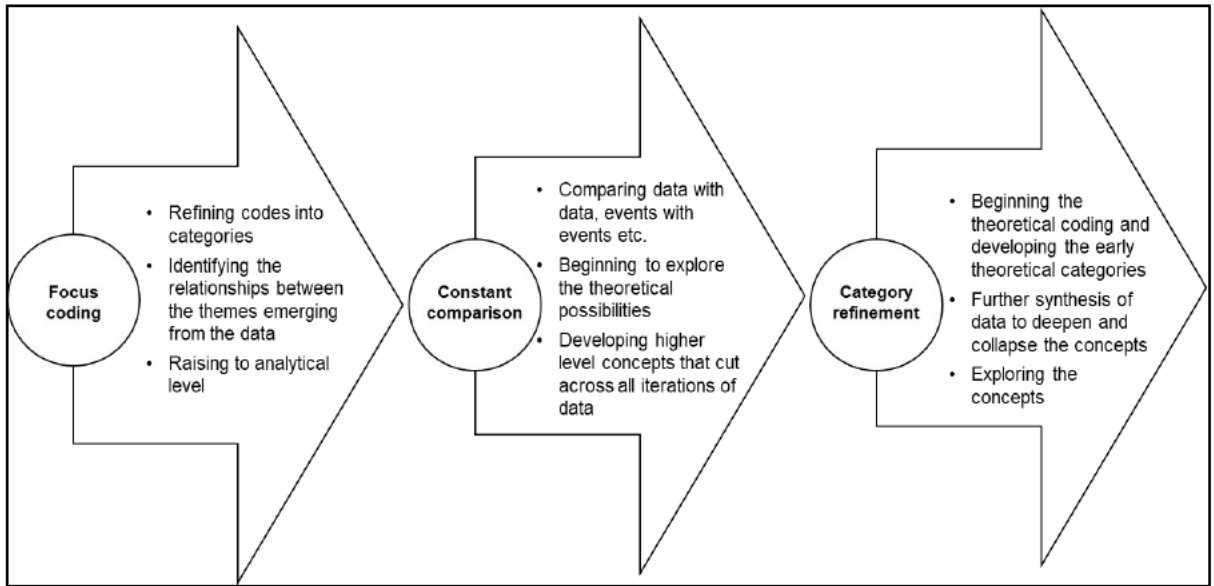
Figure 4-12: The process of moving from focused codes to categories

By developing higher level concepts, and using sub-categories/categories, the analysis moved upward to a more conceptual level (Table 4-8).

Example data excepts	Categories
"I'm dealing with relatively intelligent people that are prepared to listen and so when they can see err, some of those **contradictions and conflicts**, or that they thought about them in advance and have some suggested umm, compromise, it, it does sometimes come down to a compromise or they, they invite ideas about how to deal with that **conflict** and so I find that you know, **conflict or contradiction** is either met with a pre-considered resolution which might not be ideal but still acceptable or, or it leads to a leads to a re-evaluation of what we're trying to do." [CP7-SG-Interview-1]	Tensions
"yes we use the **SteerCos** a lot in that, so the deck that we review in those with Snr. VP and others is something I bring to my **staff meeting**" [CP4-SG-Interview-3]	Meetings

"You know, I almost, like, speak it out loud, kind of thing, to, to put things together. Um, and yeah, that's kind of, just visualise it in my mind. That's kind of the <u>space</u> that I, uh, I create." [CP9-SM-Interview-1]	<u>Spaces</u>
"I think, uh, for **the past few years**, um, there's been a huge focus on offering management more towards programme management and away from strategy. I th-, I think it is, certainly in this company <u>today</u>, incredibly difficult to **find the <u>time to think</u>** about offerings strategically." [CP8-SM-Interview-1]	<u>Time</u>

Table 4-8: Example of revisiting the data during category development

At this point I worked with the summation of codes that had common themes and interconnected patterns (Charmaz, 2014). As refinement of each category was made possible, nascent theoretical codes to begin to form, and their possible relationships to emerge.

4.10.3   Theoretical coding

As Charmaz (2006, p. 63) states "theoretical codes specify possible relationships between categories you have developed in your focused coding." and act as scaffolding to integrate the resulting theory. A "Theoretical Code specifies the possible relationships between categories and moves the analytic story in a theoretical direction." Charmaz (2006, p. 63). Ultimately, theoretical coding is the culminating action toward achieving a grounded theory (Saldana, 2013).

At this stage in the GTM execution, I went back and forth between the data and the literature attempting to confirm and then generate early hunches (Sætre and Van de Ven, 2021). In support of theoretical coding, I made extensive use of diagramming. Diagrams are 'visual devices' (Corbin, 2015, p. 106) and often associated with the grounded theory analytical process as they provide a visual representation of categories and their relationships" (Charmaz, 2014).

I used diagrams to illustrate the categories and their related connections, the process, and the 'flow' as I worked through the iterative cycle of data gathering, analysis and on to theoretical sorting and saturation of codes/categories (Figure 4-13). Each Figure 4-13 'tile', 1,

2, 3a, and 3b illustrates progression in both my thinking and levels of abstraction through the data gathering and analysis phases. In summary:

- Figure 4-13, Tile 1 shows my initial attempts to capture all the themes emerging from the data after initial coding/initial code grouping. This also shows my early view of the possible connections between initial code groupings.

- Tile 2 shows a more refined and rationalized view as I began to focus down the initial codes and code groupings and formed early concepts, that ultimately led to the simplified view in Tile 3a.

- Tile 3a represents the move from concepts into a more simplified and interconnected analytical view of the categories as I began to revisit the literature to refine and deepen the categories.

- Tile 3b depicts the saturated categories that form the foundation of the grounded theory.
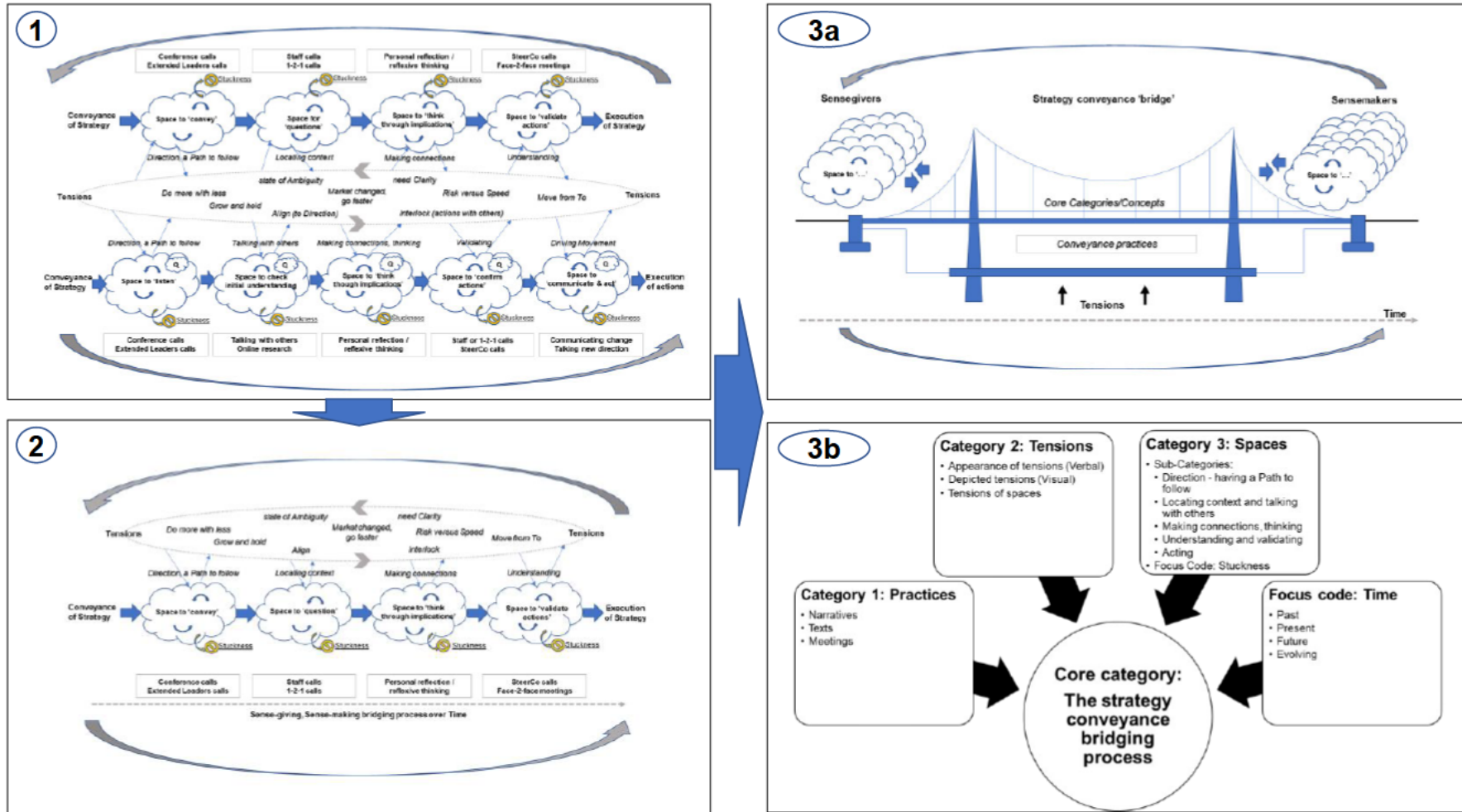
Figure 4-13: Illustrating the use of analytical diagramming

I drew and re-drew diagrams iteratively as the coding process evolved, with the diagrams aiding my analysis. Reflecting, diagrams and visual representations helped my thinking, plus acted as tools to sense check with the participants along the way. Diagramming coupled with memoing as "written records of analysis" (Corbin, 2015, p. 106), allowed me to both gain insights and reflect on literature in relation to my data.

4.10.4 GTM memoing and sorting

"[M]emos are written records of a researcher's thinking during the process of undertaking a grounded theory study." (Birks and Mills, 2011, p. 10). Memoing thus (Figure 4-14) is considered essential within GTM theory building exploration (Birks and Mills, 2011, p. 37).
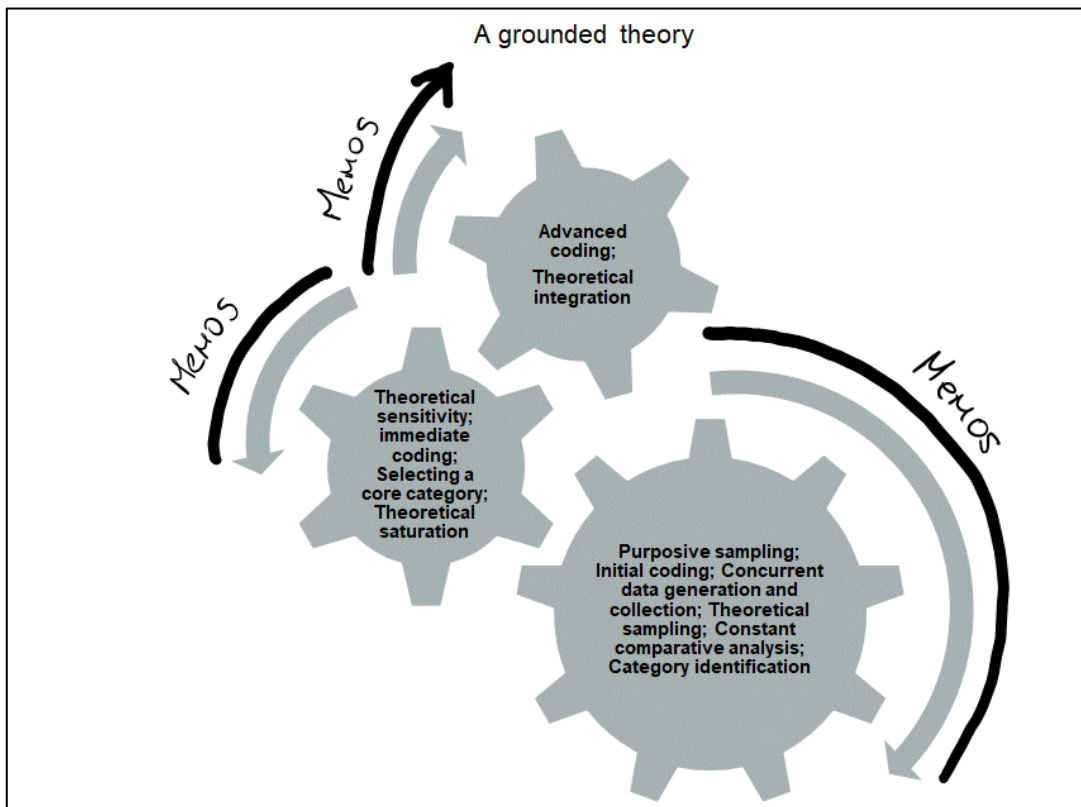
Figure 4-14: Essential grounded theory methods

Field-notes, considered a form of memoing (Bryant, 2017), from participant observation and interviews formed the supporting fodder of the analytical GTM memos, the ribcage of GTM analysis. The use of memos, as data, within this study were a key element in the promotion of quality throughout the grounded theory research process. Memoing brought to the

research the functions of: mapping research activities, extracting meaning from the data, maintaining momentum, maintained an openness to insights and sensitized me to what was going on within the phenomenon of the study (theoretical sensitivity (Strauss and Corbin, 1990)).

GTM memoing is seen as a critical component of a grounded theory study allowing the researcher to maintain their reflexivity, critical thinking, and connectedness to the data as the story that unfolds (Charmaz, 2014; Bryant, 2017). Memos/memoing serve many purposes, but in common they perform the "role of integrating the processes of abstraction and conceptualization that move the research from data gathering to articulation of a theory or model." (Bryant, 2017, p. 198).

Memoing is a form of learning and reflection (Bryant, 2017), with memos and diagrams evidence of that learning/reflecting process. Once written/drawn, memos and I included diagrams, need to be logically ordered and sorted theoretically to provide a base upon which to develop the final grounded theory (Charmaz, 2014). Applying theoretical sorting, an iterative and creative process, to the memos I wrote and the diagrams I drew (Figure 4-13 above) allowed me to look for and make connections between codes, concepts, and categories. As I progressed through the iterative cycles of analysis, the sorting of memos and further diagramming, illustrated further within Chapter 5, allowed me to integrate and then refine the resultant theory.

4.11 Evaluation of research – Part 1

Within GTM research it is expected that attention is given to the rigorous application of grounded theory methods if the intent is to develop theory that will be judged as a quality product (Birks and Mills, 2011). By maintaining an audit trail throughout the study, well managing the data and resources, and demonstrating within the write up the procedural logic applied, Birks and Mills (2011, p. 38) suggest this will "ensure procedural precision".

It is suggested that researchers apply the evaluation criteria that are aimed at evaluating the selected research method (Easterby-Smith, Thorpe and Jackson, 2012), and I utilized the constructionist GTM evaluation criteria proposed by Charmaz (2014, pp. 337-338). I also applied the set of criteria for the evaluation of grounded theory studies suggested by (Birks and Mills, 2015, pp. 147-148).

The measures taken to improve the research design, data gathering, and analysis, based on the authors above are summarized in Table 4-9 and 4-10 respectively. These tables will be

utilized again in Chapter 7 (section 7.5), where they will include the evaluation of the outcomes of the analysis and the constructed grounded theory.

Evaluation criteria	Measures taken
Credibility	As an organizational insider, researching in the site of my own practice, I had an intimate familiarity with the research setting, context, and topic of research. I had access to participants, strategy presentation meetings and primary strategy conveyance texts adding to the wealth of data. The interviews conducted were of significant length (60 minutes), the observed strategy meeting was of 3 days in duration, and the texts were extensive in content. All this allowed for the exploration of the research topic and the richness of data gathered/analysed. The process of constant comparative analysis, GTM memoing and diagramming were adhered to throughout the procedural steps of the grounded theory study. Extracts from all stages of the analysis have been presented as Tables, Figures or Appendices.
Originality	See Chapter 7.
Resonance	
Usefulness	

Table 4-9: Measures taken to enhance the quality of the study based on Charmaz's (2014) evaluation criteria (1)

Evaluation criteria	Measures taken
Researcher expertise	I undertook extensive reading on GTM as both methodology and methods, with a particular focus on the constructionist grounded theory method. I familiarized myself with the procedures of GTM study design, logic of inquiry, data gathering and analysis, and theory building.
	My academic writing and presentation skills have improved through the number of academic writing activities and colloquia presentations whilst studying for the Doctorate Business Administration.
	Grounded theory resources were consulted and cited when relevant.
	Limitations of the study have been articulated throughout this thesis and in Chapter 7, section 7.6.
Methodological congruence	I have provided a detailed discussion on my philosophical and epistemological position and made references to the connections between my philosophical position, the research aims and the chosen method.
	Constructionist grounded theory was judged to be appropriate for the research aims of the study (Chapter 3).
Procedural precision	I followed the analytical procedure as outlined by Charmaz (2014) and offered a detailed account of the data gathering and analysis (Chapter 4, sections 4.7, 4.8, and 4.9).
	I adhered to the methods of memoing and diagramming throughout the analysis and presented evidence throughout the thesis.
	I maintained a reflexive approach towards the data and engaged in research, peer, supervisor, and work colleague discussions aimed at honing my reflective skills.
	I followed the methodological procedures advocated by Charmaz (2014), and I went step by step from initial coding to categories, moving back and forth between induction and abduction. I illustrated logical connections between data and codes, categories, and theory.
	The categories and the resultant grounded theory are rooted within the data and can be tracked back through previous levels/stages of the analysis and coding.

Table 4-10: Measures taken to enhance the quality of the study based on Birks and Mills' (2015) evaluation criteria (1)

4.12 Summary - Chapter 4

This chapter began by summarizing how GTM was executed within this study, the Unit of Analysis applied, and mode of inquiry employed. I then covered the important topics of data management and ethics. A revisit of the research questions and a discussion placing the data gathering in context and the approach taken to sampling followed. The methods utilized during the four iterations of data gathering and analysis were presented: Responsive Interviewing or both sensegivers and sensemakers, Participant observation, and Genre analysis of texts. The application of GTM constructionist coding through initial, focused, and theoretical, including the topics of constant comparative analysis, analytical diagramming and GTM memoing were presented and discussed. Then finally to conclude this chapter, I introduced and reflected upon the measures took to enhance quality of the study using evaluation criteria appropriate for a constructionist grounded theory study.

Chapter 5 that follows presents the findings from the iterative data gathering and analysis, including the focused codes and conceptual categories, that led to the construction of the resultant grounded theory.

5 Findings: Towards the bridging process

"The only way to make sense out of change is to plunge into it, move with it, and join the dance." - Alan Watts.

5.1 Introduction

The aim of this chapter is to discuss how I arrived at my three theoretical findings which relate to my primary and two supporting supplemental research questions (Figure 5-1).

```
┌─────────────────────────────────────────┐
│      Primary Research Question:          │
│                                          │
│    How do tensions influence IT strategy │
│        conveyance between leaders as      │
│    sensegivers and managers as sensemakers│
└─────────────────────────────────────────┘

┌──────────────────────────┐   ┌──────────────────────────┐
│ Supplemental Research     │   │ Supplemental Research     │
│ Question:                 │   │ Question:                 │
│                           │   │                           │
│ How, and when, are tensions│  │ How are tensions experienced│
│ conveyed through the mediums│ │ and become salient for     │
│ of narratives and texts?  │   │ sensegiving leaders and    │
│                           │   │ sensemaking managers?      │
└──────────────────────────┘   └──────────────────────────┘
```

Figure 5-1: Primary and supplemental research questions

The findings are structured in relation to the two supplemental questions first (section 5.2) and second (section 5.3), then the third finding relates to the primary question (section 5.4).

In doing so, I draw greatly from the voices of my conversational partners (Portfolio Leaders (as sensegivers) and Offering Managers (as sensemakers)) and from the analysis of those primary texts, identified by the organization's practitioners, as exemplar strategy conveyance texts.

Following presentation of the categories, sub-categories, and focused codes that emerged, I summarize the main points from each before moving on to repeat the process for each

theoretical finding. The picture painted by the emergent categories and codes helped build the understanding necessary to theorize the process of strategy conveyance and move towards an answer to the posed research questions.

Finally, I will consider the relationships between the categories and codes that form the core category (Figure 5-2) and how I constructed the findings.
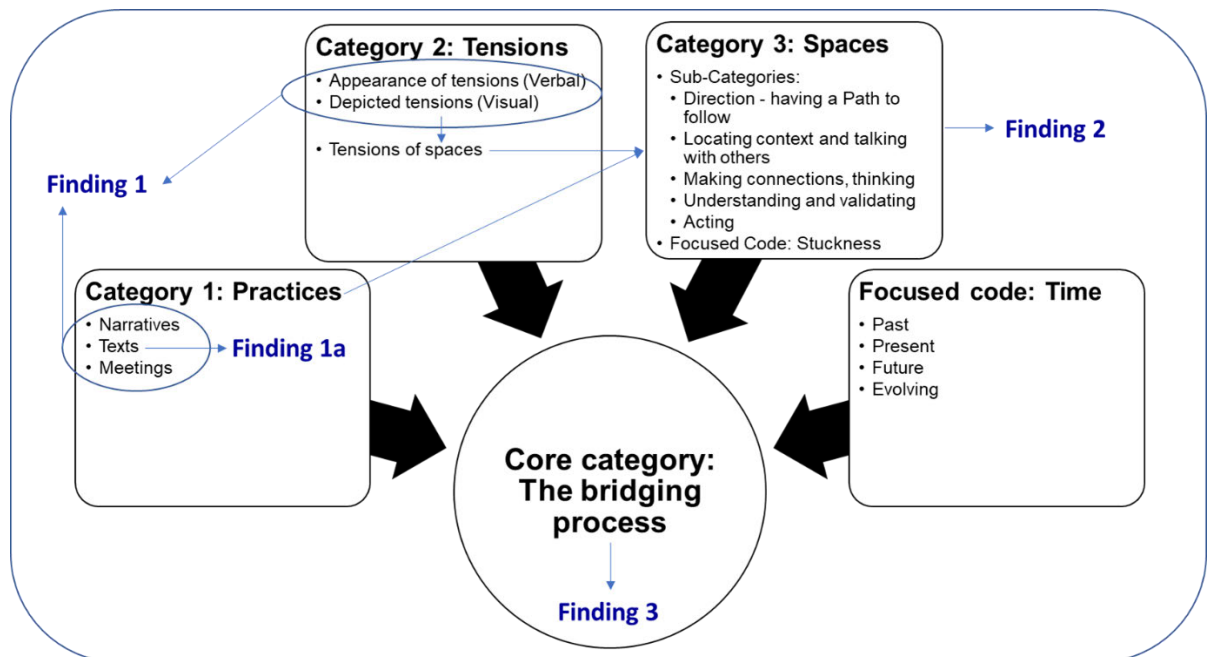
Figure 5-2: Relationship of Codes, Categories and Findings

When presenting the categories, sub-categories, and focused codes, I use the term 'conversational partner' abbreviated to CP, as either CP-sensegiver (CP-SG) or CP-sensemaker (CP-SM), and throughout, quotations are referenced with a CP number, SG or SM label, and corresponding interview iteration. Texts are referred to by a unique alpha-numeric identifier. The main reason for taking these steps is one aimed at anonymizing to protect both the confidentiality of my conversational partners and the organization where the data was gathered.

Finally, as I present my findings, I periodically include revisits of the academic literature for insights either when looking for guidance on how to analyze the data through the four (4) iterations or to help explain some of the emerging concepts.

I now present each theoretical finding, the categories, sub-categories, and codes that support each finding, along with the supporting evidence.

5.2 Finding 1: Narratives and texts are carriers of tensions

The first finding pertains to the supplemental question: How, and when, are tensions conveyed through the mediums of narratives and texts?

The finding for this question is stated as:

Finding 1: Narratives and texts are carriers of tensions - The tensions of strategy conveyance are inherent within the language, lexicon, and metaphors used in both the sensegiver narratives and texts (both stated and implied) throughout the conveyance practices. Further, the metaphors utilized structured the tensions in a way that makes those tensions salient thus allowing the sensemakers to notice the implications to themselves and their work.

In this sub-section (5.2.1), I present Category 1: Practices with one focused code and two sub-categories contributing to the construction of this finding. Both the sub-categories of Narratives and Texts themselves contain tensions and metaphorical terms abound.

5.2.1 Category 1: Practices

"[S]trategy practices, …, do not simply coordinate and control strategic activity but rather mediate between different actors in accomplishing an evolving stream of strategic activity over time." Jarzabkowski (2005), (cited, Jarzabkowski, 2011, p. 133).

This category was constructed from the cycle of continued iteration throughout this study. While revisiting the data it became apparent that a higher level of abstraction was necessary to account for not just the conveyance of strategy via narratives and texts, but also the activities by which those narratives and texts were conveyed, i.e., the virtual and physical meetings that enabled the conveyance process.

Category 1: Practices (Figure 5-3) is therefore the integration of:

Focused Code: Meetings,

Sub-Category 1: Narratives,

Sub-Category 2: Texts.
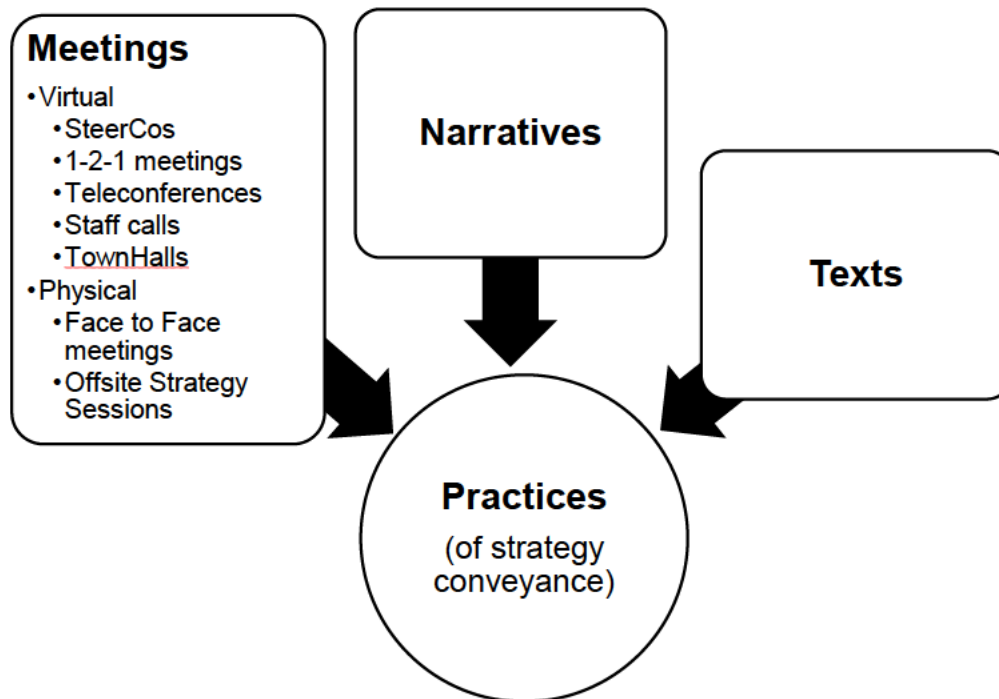
Figure 5-3: Codes to Category 1: Practices

5.2.2 Focused Code: Meetings

This code was constructed from the narratives of the conversational partners. The CPs talked about both physical and virtual occurrences in the form of meetings (Table 5-1) throughout their daily work interactions.

Meetings are considered praxis, i.e., the flow of work (Jarzabkowski, Spee and Smets, 2013). In a study of 51 observed meeting, Jarzabkowski and Seidl (2008) suggest that meetings are focal point strategic episodes which play a role in shaping strategic organizational stability and change.

Several specific enabling conveyance activities emerged from the narratives (Table 5-1) and were coded as follows:

- Focused Code: Meetings.

Meetings	Physical (P) / Virtual (V)	Example evidence
Offsite strategy sessions (face to face)	P	"I thought (Executive Leader) did a really good job of providing us the foundational components for each of these deliverables we need to create, (with) clear examples of what he thought was good and not good and it wasn't just slide-ware ..., and then working with people in the audience right, able to provide concrete examples and help us understand why what we're talking about is important, why it matters, right." [CP2-SG, Interview-1].
Staff meetings	V	"I have a weekly team meeting for my staff really to kind of support them with that 'cause I know that they don't get the chance to read every email or whatever" [CP6-SG, Interview-1], "Um... the staff calls are good, I think, for, um, for the, the team updates, right, so we know what we're doing together as a team." [CP9-SM, Interview-1].
SteerCo teleconferences	V	"yes, we use the SteerCos a lot in that (discussing the strategy), so the deck that we review in those (SteerCos) with (Leader) and others is something I bring to my staff meeting and we talk, talk through and talk about what is aligning to our strategy, how are we realizing that, and what are the results we're getting from it. [CP4-SG, Interview-3], "You know, now we've got the Steer Co calls as well, um, and, and in effect, they're, they're strategy at a, at a, I, let's say an offering level" [CP8-SM, Interview-1].
Town Hall / Extended Leaders meeting	V	"I use the staff meetings a lot to allow them to ask questions, to get clarity, umm, make sure there's understanding, so when people say hey, we went

		to the All Leader (Town Hall) meeting with (Executive Leader) today and he said something about AWS and Azure, and I interpreted X that as, and is that really what he meant?" [CP4-SG, Interview-3], "I'll ask (Executive Leader) in, you know, one of the open calls (Extended Leader meeting)" [CP11-SM, Interview-1].
1 to 1 meeting	V	"I'll do one-on-one sessions with pretty much 80% of my staff on a biweekly basis is really where we're at right now" [CP6-SG, Interview-1], "I also have regular one-to-ones and I always say exactly what I think about certain things. And in fact, I had a conversation yesterday about something on (Executive Leader's) staff call last week." [CP12-SM, Interview-1].

Table 5-1: Meetings

If the "practice of meetings is related to consequential strategic outcomes" as Jarzabkowski and Seidl (2008, p. 1391) state, then meetings targeted at the conveyance of strategy are an important component of strategy work.

The combination of narratives, texts, and meetings work together to activate tensions. Strategy narratives and texts, unless shared verbally and/or visually with practitioners during work meetings can be said to have no agency and thus no ability to surface tensions over time until they have a vehicle to bring them out. Looking at meetings with narratives and texts in this initial activity also raises a temporal dimension within the practice of activating the apprehension of tensions. Meeting practices accumulate over time, with meetings starting large but becoming more personal/local thus allowing the examination of the salience of tensions as they manifest in the differing SMs spheres of activity.

5.2.3 Sub-Category 1: Narratives

This sub-category was constructed from the narratives of the CP-SGs during their conveyance of strategy and the CP-SMs reflections of what they heard.

Four focused codes emerged (Figure 5-4) and were coded as follows:

- Telling the strategy story,

- Metaphors and Analogies,

- Lexicon,

- Appearance of tensions.
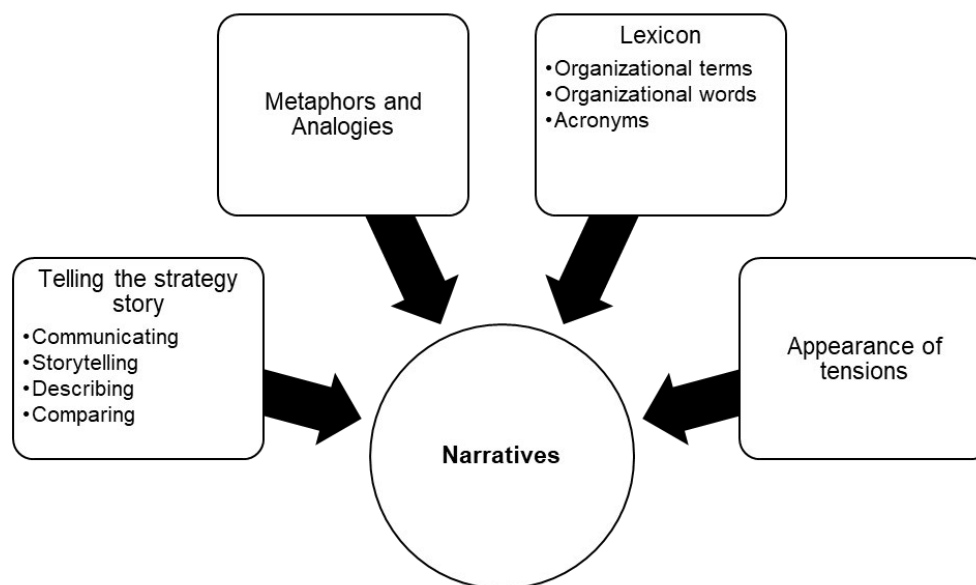
Figure 5-4: Codes to Sub-category 1: Narratives

5.2.3.1 Focused code: Telling the strategy story

As the study organization's Portfolio Strategist, myself, I had lived experience of how both I and the CP-SGs articulated the portfolio strategy. This lived experience and the sense of storytelling were strongly present in the narratives of the SGs, e.g.,

"communicating strategy is a complex mix related to telling a story, taking people on a journey and attempting, and I'm going to use something you've just said "to paint a picture" of how the vision could be executed in relationship to their perspective. While also attempting to give them enough detail to ground someone's understanding." [CP2-SG, Interview-2].

Multiple, for want of a better word, 'techniques' were used by the SGs to impart the strategy 'story', e.g., highlighting what was occurring in the IT Industry marketplace via positioning,

competitors and/or vendor announcements, imparting a sense of urgency, painting a visual vision, and talking about the journey needed. Evidential examples of each of these 'techniques' in the words of the CP-SGs follow:

Highlighting market positioning:

Discussing the market so to position the strategies in context e.g.,

"where (Leader) and the leadership team thinks the market is trending and going and how (NewCo) adds value to that, 'cause, 'cause I think, I think that's important in understanding and helping people, and everyone else understand where we fit, where we play, or are we in a natural, or are we just on a cycle of obsolescence of our, of our own services." [CP4-SG, Interview-3].

Talking about competition

The link to what the marketplace competition were doing was strongly articulated during the conveyance of strategy by the SGs, e.g.,

"it's all about understanding your competitive landscape, and your competitive marketplace 'cause obviously we're not the only organization that offers these services umm to, to clients, umm, trying to understand what are our competitors doing, who are the new competitors coming into that space, umm, are there other industries that could start to compete with us so we have to have a view of what, of what's going on there." [CP5-SG, Interview-1].

Imparting a sense of urgency around the strategy:

The Offering Managers *"need to understand that there are certain elements that we need a sense of urgency about but that we have a longer-term vision and the strategy" [CP6-SG, Interview-1].*

Painting a vision:

SGs use of visual metaphors to bring the strategic vision to 'life', *"help show how the puzzle pieces come together" [CP2-SG, Interview-1].*

Talking the sense-makers through the strategy journey:

SGs referencing the strategy conveyance as a 'journey' that needs to be taken to enact the organizations strategy, i.e*., "in communicating to people what destination we're trying to reach, being able to reach into their thoughts and feelings about why it's important and what's still to be celebrated and I think if we get them in a very genuine and honest way*

ready and receptive to embark on a journey of some pain before we can realise the gain,
then I think that they embrace the strategy" [CP7-SG, Interview-1].

The 'telling' of the strategy story within the studied organization utilised numerous
approaches and as Boje (1991, p. 106) suggests "In organizations, storytelling is the
preferred sensemaking currency of human relationships among internal and external
stakeholders." with the studied organization no exception, as the evidence presented shows.

5.2.3.2 Focused code: Metaphors and analogies

The language used by the SGs and SMs was a rich, generative (Weick, 2007) seam of
metaphors and analogies that were used throughout every conversation (CP interview)
conducted and found in the texts analysed. Referring to the conveyance of the organization's
portfolio strategies, the analogies and metaphors painted vivid pictures from big rocks, blue
skies, and concrete kites, to likening the portfolio strategies to being on an America sports
field using 'Playing to Win' tactics and 'Strategic Plays'.

The sheer number of metaphors in this study's data gave depth to the coding process, the
resultant categories and ultimately the findings where it's seen that the metaphors are
guiding future action (Lakoff and Johnson, 1980) and aiding meaning making by structuring
the strategy conveyance tensions related to working through the challenges of continuity and
change, themselves metaphorical, in a systematic flow (Figure 5.5).
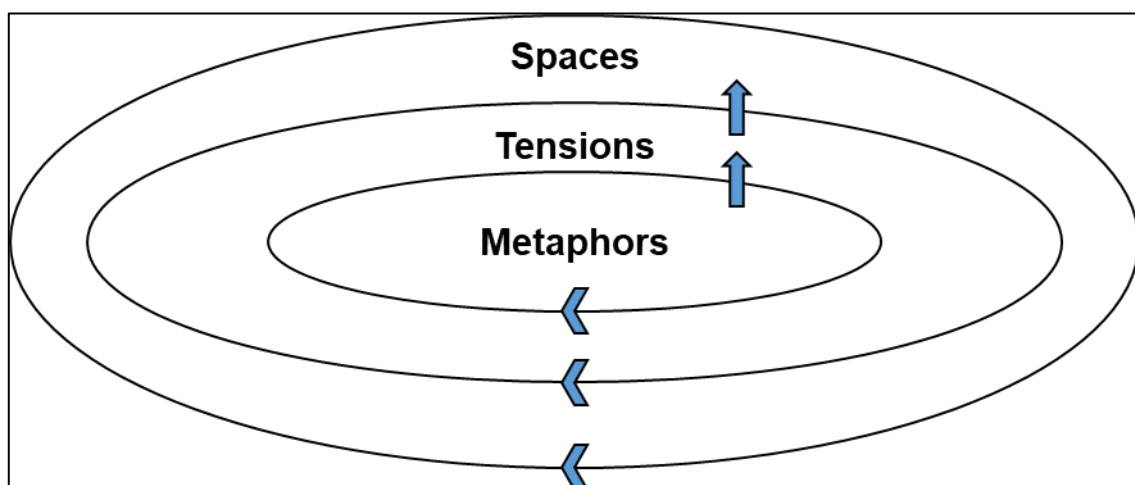
Figure 5-5: Metaphors structure the tensions related to working through the continuity and change challenge

5.2.3.3 Returning to the literature: Metaphors

As Lakoff and Johnson (1980, p. 3) state "metaphor is pervasive in everyday life, not just in ordinary language but in thought and action".

Borrowing from the field of nursing research and metaphors, Rocco *et al.* (2014) suggest that metaphors are used as a vehicle to enhance understanding when investigating phenomenon and that metaphors are effective at describing experiences or perceptions allowing understanding to occur.

Effectively, "A metaphor is a transference, naming one thing in terms of another." (Gozzi, 1999, p. 380). In recent times the term metaphor is often used to describe any similarity or analogy, and as a 'connector' term where "metaphor as a bridge, involves carrying over [meaning]" (Gozzi, 1999, p. 381). Lakoff and Johnson (1980) describe the metaphorical transfer process as 'mapping' i.e., mapping the features from the source domain to the target domain, where a "metaphor asserts a structural similarity between two domains normally thought of as separate" (Gozzi, 1999, p. 383). Turner and Fauconnier (1995) do note however, that not all metaphors map from source to target domains, but instead two or more domains may be involved, and rather than the metaphor mapping from one domain to another, instead there is a blending of the domains into a separate conceptual space that has its own emergent structure.

Metaphors come in several types and are also suggested to work on more than one level of thought or language, e.g., surface metaphors - usually observed first, deep metaphors - detected from the relationships between surface metaphors, root metaphors - those metaphors that underlie major western philosophies, and meta-metaphors - where metaphors expand our frames of reference by linking specific phenomena with larger archetypal concepts, e.g., 'light and dark', 'hot and cold', and changes in the seasons (Gozzi, 1999). Cognitive, container, rhetorical, ontological, orientational, and structural are also considered types of metaphors (Table 5.2). Applying data from this study, Table 5.2 captures the breadth of metaphorical types occurring.

Metaphors and analogies do however have limitations. There is a source domain, and a target domain, and then the metaphorical entailments that connect them. You can analyse what is not used in the metaphor, what the metaphor hides when applied to the 'thing' that it applies to, and then what it highlights as an entailment (Turner and Fauconnier, 1995). Well-chosen metaphors can make important issues easier to discuss by masking the direct topic, though metaphors can only be 'pushed' so far before the comparisons, between source and

target domains, tend to collapse (Etzold and Buswick, 2008). We also have to remember that "metaphors do not answer questions, they rather pose new questions that business has to answer." (Etzold and Buswick, 2008, p. 284). In the sensemaking process however, the value of metaphors lies in their ability to allow for creative rather than directive thinking within the strategy conveyance process. Metaphors of course can also convey without words when visuals/pictures are 'in play'. E.g., the 'House' slide (Figure 4-6), is about keeping things all under one roof, conveying the message of internal diversity (of offerings and capabilities) to meet various customer needs.

Types of metaphor	Evidence of occurrence within study	Comments
Cognitive ("foster creativity" (Etzold and Buswick, 2008, p. 279))	" <u>PLAYING TO WIN STRATEGY</u>" [EMEA Workload And Cloud Practice_FY16 Growth Summit_PRESENTATIONS.pdf]	The metaphor here of 'playing to win' (based on the work/book of Lafley and Martin (2013)) is reminding the SGs and SMs of the strategy definition and execution process they had previously received training on, and the thought and inventiveness that process requires.
Container (Containers have an inside and an outside, moving from space to space is moving from one container to another, i.e., out of one and into another imposing boundaries on the way. (Gozzi, 1999))	"<u>you have a container and you have these big rocks (of strategy) and you have sand and if you put the sand in first there's not enough room for the big rocks kinda thing</u>, that's what were, that's really what we need to go focus on is, what are those big rocks that we would go address" [CP3-SG, Interview-1]	The source domain of a container implies the putting in of either big rocks or sand and implying having to choose to put the big rocks in the container as a way of acknowledging that those are the target domain items/issues that need to be tackled first.
Deep (detected from the relationships between surface metaphors, (Gozzi, 1999))	"quite a balancing act" [CP1-SG, Interview-2]	Balance, as a deep metaphor (Zaltman and Zaltman, 2008), covers equilibrium, harmony, adjustment, and the offsetting of forces. The use of the balance metaphor is applied by this SG in relation to discussing the tensional nature of strategy conveyance, the changes needed.

Rhetorical ("create recognition, but do not encourage further thinking." (Etzold and Buswick, 2008, p. 279))	"you know, and you get kind of dribs and drabs, um… But, you know, you, you get dribs and drabs out there that, um, maybe you don't hear on a (Executive Leader) call." [CP8-SM, Interview-1]	The metaphor of 'dribs and drabs' hints at a feeling of sparsity of information and the associated intermittent flow of information/knowledge.
Root/Meta root- (those metaphors that underlie major western philosophies and expand our frames of reference by linking specific phenomena with larger archetypal concepts (Gozzi, 1999))	"because we know we should be building those big rocks" [CP3-SG, Interview-1]	Taking about the challenging items that need to be constructed, in terms of a mountain (big rocks).
Ontological ("are necessary for even attempting to deal rationally with our experiences" (Lakoff and Johnson, 1980, p. 26))	"become a gravitational force" [Field Notes-1_to_3rd-September2015-EMEA GrowthSumit.docx]	Grounding the participants while laying out the pathway to follow, orientating on what needs to be undertaken and what the outcome needs to be.
Orientational ("organizes a whole system of concepts with respect to one another." (Lakoff and Johnson, 1980, p. 14))	"You know, we continue to talk about, bounce ideas off each other. And then, ultimately, in the end, it's like, okay, well, I still got to sell (internally convey) all three of 'em, so… you know." [CP11-SM, Interview-1]	The metaphor of 'bounce ideas off' is verbalizing the 'to and fro' of conversation by the SMs to help them make sense of what is being conveyed so they can onward communicate and act.
Structural ("where one concept is metaphorically structured in terms of	"a paint by numbers scheme where the sky is blue, but it might be light blue or dark blue, or it might be black because it's a	The metaphor of painting by numbers in the source domain hides the fact that often the sensegiver is the designer of the painting (or at least knows how

another." (Lakoff and Johnson, 1980, p. 14))	night-time version you're painting for someone" [CP4-SG, Interview-2]	the painting was envisaged) in the target domain. This hides the skill of the painter, the blending required at intersections, and the flexibility needed in interpretation.
Surface (Explicitly stated in discourse, surface metaphors imply some analogy or structural similarity between two domains of reference. (Gozzi, 1999))	"I have an analogy that I tell people around concrete kites, we were great at building concrete kites, we had the best concrete kites in the industry, fortunately nobody bought any [laughter], everybody kinda went out and built their own kite that would fly, and we had a bunch of good ones sitting on the lot, but we couldn't sell" [CP4-SG, Interview-1]	The source domain of the concrete kites metaphor doesn't use the wind and lift associated with kites, nor does it really focus on the density and robustness of concrete, in the target domain it hides the digital nature of the services, and the human interface involved with clients, but in the overlap it entails the difficulty of taking flight with new products, the blue sky thinking involved in ideation, and the down to earth construction of implementing strategy

Table 5-2: Types of metaphors and examples from study

Looking at aspects of Table 5-2 above, the container metaphor example shows a sensegiver metaphor, while the rhetorical metaphor shows a sensemaker example. The sensemaker metaphor seems to be contradictory to the sensegiver metaphor in that they find the lack of specifics approach frustrating. The sensegiver on the other hand wants to start with the abstract big issues, but the SM wants the details quickly so they can act. Ultimately there is tension here, and an influence on the communication process in terms of time.

If metaphors do more than describe an external reality but also help constitute that reality and, are prescriptive on how that reality should be viewed (Tsoukas, 1991) then metaphors have a large role to play in how sensemakers both experience, interpret, and then make meaning from the narratives and texts of a strategy conveyance process. As Gozzi (1999) suggests, metaphors can be thought of as a 'bridge' that involves the carrying over of meaning, but that 'bridge' can sometimes lead into the unknown, a place where tensions can abound.

Given the data was rife with metaphors and analogies (Table 5-2), it became apparent that there was more going on than I originally expected. The topic of metaphors is again visited in sub-section 5.3.3 of this chapter, after the category: tensions are discussed in Finding 2 (sub-section 5.3.2).

5.2.3.4 Focused code: Lexicon

The language of words, terms and acronyms utilized in everyday practice by the practitioners of the studied organization was rich and varied. Table 5-3 provides evidence of examples of such words, terms, and acronyms, though this list is far from exhaustive due to the extensive nature of the lexicon used within the organization studied. In addition, I do not explain all the words, terms and acronyms used to maintain participant and organizational anonymity. However, the lexicon utilized is important in that the seasoned organizational practitioners will generally understand the terms and use them in the same fashion, though not always. Some of the terms are external market acronyms, e.g., virtual machines (VM), known throughout the IT Industry, while other terms are internal to the organization and are often terms which have internal meaning such as 'roadmaps' (the feature/function release plans for service offerings).

Evidence of organizational lexicon
"the PoR process tends to be 12-18 months, the Visioning/Strategy from an offering tends to be 12-36 months and the Account planning tends to be 36 months, so they've all got different timescales" [CP5-SG, Interview-1]
"Hyper-V is a good example. I've looked at it and said, you know, we've got 5,000 VMs on VPC that are Hyper-V out of the 200-something thousand that we have." [CP4-SG, Follow up interview]
"We have to figure out how we're going to make the story a reality (Researcher: uh-huh), and it has to be reflected in our roadmaps." [CP11-SM, Interview-1].
At the CPI level we do a better job of, um, of emphasising how and where we want to invest for growth." [CP10-SM, Interview-1]
"Cloud, Platforms & ITO FY18 Performance" [01-FINAL-Appendix 2b FY19 SBP CPI Presentation]
"Transform legacy client agreements to hybrid nextgen solutions and replace lost revenue with digital enablers." [01-FINAL-Appendix 2b FY19 SBP CPI Presentation].

Table 5-3: Evidence of organization lexicon

As shown in Table 5-3, there are lot of terms open to interpretation. The roadmap quote above (Table 5-3) is a pivotal example of this, in that the lexicon is trying to communicate a path towards a future but the terms are open to interpretation at the SM level because what

is involved in delivery is new and unknown in terms of the potential implications for clients and the necessary manager actions.

With words and terms open to interpretation, the telling of the strategy story, itself laden with metaphors, becomes an interwoven 'swirling soup' of things the SMs must interconnect and make sense off before they can begin to progress forward to action. If SMs cannot make sense of the language used by the SGs, are usure of the meaning of terms, then ultimately the strategy won't 'land'.

Luckily some of the SGs do recognize the importance of the lexicon used in their conveyance of strategy, e.g.,

"part of what we need as a team is that common language and the common chord, that language that we are agree to and state and that allows us to create the structures our teams can live into and I think the more we have that language, the more … we are, and we're not collapsing terms but we are aligned on that same core message I think it really does make a big difference in impact in the way the, that the strategy is clearly communicated, because the more that we're aligned in that message the more that that language and those terms and we're agreed and are operating in that way, the more we appear as a cohesive structure for our team, and I think that is the deal maker for me." [CP6-SG, Interview-1].

Bencherki *et al.* (2021, pp. 611, empahsis in orginal) extend studies on materiality of strategy by considering "that language use *itself* constitutes a materialization of strategy".

Language is also acknowledged to have a critical role in the sensemaking process, though a scholarly explanation of how the function and roles of different linguistic processes aid sensemaking meaning is still a gap in knowledge (Whittle, Vaara and Maitlis, 2023).

Next, I present the evidence related to the code, Appearance of tensions.

5.2.3.5 Focused code: Appearance of tensions

Tensional language appeared within the first iteration of this study's data gathering and analysis and continued throughout all further iterations. The tensions were represented in numerous ways within both the narratives and texts e.g., as concerns, problems, challenges, lack of alignment, blockers, impacts, obstacles, lack of connection, changes, tensions, ambiguity, needing clarity, and at times even lowlights or opportunities to seize (examples shown in Table 5-4 and Figure 5-6).

Narrative source	Example of tensions within narratives
CP4-SG, Interview-1	"the incentives that drive the different constituent groups are created as such that they're not aligned to the common good we have a set of incentives from corporate, from CEO, from EVP, that say these are the things that are important to us here's how we're going to measure those things that are important to us, and here's how we will err measure people on those things that are important to us, that never gets connected or translated well to folks charged with executing on those strategies"
CP3-SG, Interview-2	"that, you felt that there were something that the offering managers were having to deal with or that there were roadblocks in their way or there were obstacles or that, that the process wasn't working, there were things going, going on"
CP8-SM, Interview-1	"I think from, from my perspective, I think perhaps we try to deliver too much in too little time in terms of, you know, these are the leaders and this is the strategy."
CP11-SM, Interview-1	"E for S is a great example of this. We sometimes have an interlock on what we're doing – the whole CPI thing, the whole roadmaps, all the things that we do. We release these things – version 1.4 is where we're heading – and we're not to the point where you have complete alignment on who does what, when, between the major organisations [internal departments] that play in the game."

Table 5-4: Examples of tensions becoming salient for the CPs

Note: Figure redacted for confidentiality.

Figure 5-6: Illustration of representation of tensions within a strategy conveyance text

Although I began the study expecting that tensions may exist in the conveyance practices, what was surprising was the sheer number and variety of tensions that were present in both the narratives and texts. As a result, the topic of tensions is revisited three more times within this chapter, in sub-section 5.2.2.3 (Depictions of tensions), throughout section 5.3 (Tensions within spaces), and then section 5.4 (Tensions as a supporting category of the core category).

I now move to present evidence in support of the second sub-category, Texts.

5.2.4 Sub-Category 2: Texts

The second sub-category, Texts, was constructed from the qualitative coding of CP interviews where they discussed texts, and from the analysis of practitioner selected strategy conveyance texts.

Three focused codes emerged (Figure 5-7) and were coded as:

- Genre,
- Visuals,
- Depicted tensions.
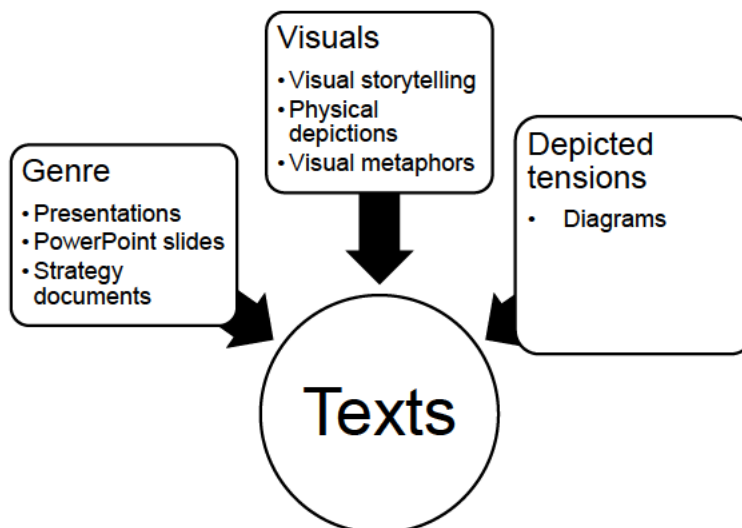
Figure 5-7: Codes to Sub-category 2: Texts

5.2.4.1 Focused Code: Genre

The studied organization utilized a genre[15] of texts as a supporting vessel for the conveyance of strategy, with the predominant format that of Microsoft PowerPoint presentations.

"the most popular method at least I see and I use is still PowerPoint" [CP1-SG, Interview-1].

When talking about the use of strategy texts the SGs and SMs had various things to say about how the texts were viewed, applied, how they were used within the conveyance practices by SGs and then, how SMs considered those texts presented alongside the SG narratives imparting the strategy, e.g.,

SG perspective on texts:

The SGs have an expected use for the texts, i.e., as supporting the strategy narrative as to why change needs to occur and where the SMs should focus their attention as part of the strategy process.

"I think you (Insider researcher) and (Executive Leader) and the team have done a very good job of putting the strategy down into a handful of slides, to be quite honest. I think it's, it's pretty clear..., what we're trying to do, the areas of focus of course, understand why the areas, these are the areas of focus" [CP1-SG, Interview-3],

"even if it's not completely right I'd rather get something on paper to kind of drive the (strategy conveyance) process" [CP2-SG, Interview-1].

SGs do have an expectation though that the texts will promote dialogue between the SG and SMs. The sharing of the texts by the SGs with the SMs also allows the SMs to revisit the texts after the meeting discussion to further think and take meaning.

"you know, you literally need to go through the PowerPoint's in a discussion, in a meeting, you know with the teams you know update, once you've updated things share that umm, with your team umm" [CP1-SG, Interview-1].

Each strategy conveyance text appears to have a certain component of the strategy storyline (see Figure 5-5 below), but the SGs combine the usage of those different texts to promote

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[15] For the details of how Genre analysis (Swales, J. (1990) *Genre analysis: English in academic and research settings.* Cambridge University Press.) was applied within this study, see Chapter 4, section 4.6.

strategic thought about the future in the minds of the SMs, rather than just the day-to-day status reporting, e.g.,

"I use the Roadmap decks (PowerPoint presentations) and the IRB decks to get people out of the day-to-day tactics and back into the vision" [CP6-SG, Interview-1].

SM perspective on texts:

The SMs appear to have a more direct expectation from the strategy conveyance texts. Not only do the SMs expect the slides to be a combination of words and diagrams, but they actively want to be taken through the narratives associated with the texts in summarized form by the SGs.

"I like (PowerPoint) slides that have the picture, and the speaker notes at the bottom, if they're gonna do that, otherwise hit me with the three bullet points that explain. If your picture can't do it for you, put two or three bullet points and that ought to be enough." CP11-SM, Interview-1],

"Yeah, so, when they're (PowerPoint slides) done well they're very, very helpful. Um, for, to g-, for me personally, um, I'm extremely graphical in, in nature. So, you know, I, I, I get much, much less out of a… you know, out of a speech than I do out of, um, a full visual presentation. Um, I'll retain a lot less. So, yeah, having accompanying materials and things that link off to in-depth explanations of concepts that you can't go into, um, in a, in a particular venue, those are all very helpful – as long as they're done well. [CP10-SM, Interview-1].

The SMs then want the detail to be available to them in other artefacts/forms so they can appraise them after the initial 'telling' to improve their clarity of understanding. The SMs then plan to use those same texts to onward communicate when they themselves become comfortable enough to become a sensegiver.

"when you're provided with that material that's produced by somebody else, unless you're actually taken through that material by them, in other words they present to you its sometimes quite difficult to erm, interpret some of the slides if we're talking specifically about PowerPoint, erm, how you interpret those slides and how you then pass that message on, because there is erm, I think a huge erm, area for misinterpretation in slide decks, unless of course you have erm, extensive narrative associated with each slide. [CP-12-SM, Interview-1].

Alongside looking at how the SGs and SMs talked about the texts of strategy conveyance I also applied Genre analysis using the approach of 'Rhetorical moves' (Swales, 1990) to four

of the primary texts. The intent was to confirm that these texts were archetypes of strategy conveyance. Further, as the Portfolio Strategist, I was exceedingly close to many of these texts from their inception so applying genre analysis gave me another perspective on the texts. This analysis, summarized in Table 5-6, aims to show how language is used within the Portfolio organizations strategy conveyance texts, and that these texts are of a type that can be classed as 'a genre', i.e., "a distinctive category of discourse of any type, spoken or written" (Swales, 1990, p. 33).

This 'genre' of strategy conveyance texts also shows commonalities of:

    i)   attempting to integrate the past with the future,

    ii)   are situated within the discourse (Portfolio practitioner) community where their beliefs and naming (language and lexicon) have relevance,

    iii)   have an emphasis on social action and are communicative in purpose,

    iv)   appear to have a common structure and flow, and,

    v)   attempt to establish goals/objectives and the enablement of those portfolio strategy goals (Swales, 1990; Askehave and Swales, 2001), consistent with being 'labelled' a genre.

Document:	1 (PoR-POI Roadmap deck)	2 (CIO deck)	3 (FY19 SBP doc)	4 (FY19 SBP supporting deck)
Internal or external focus:	Internal	External	Internal	Internal
Intended audience:	OM, Solutioning & Sales	Clients	NewCo Board	NewCo Board
Rhetorical moves				
THE AUTHORITY	Opening: What the story will tell, topics and positioning of the topics and AUTHORITY to tell the story (The INTRO of THE WHAT) move	Opening: The positioning and statement of AUTHORITY to convey message/info/knowledge move	Opening: The positioning and statement of AUTHORITY to convey message/info/knowledge move	Opening: The positioning and statement of AUTHORITY to convey message/info/knowledge move
THE IP	Confidentiality statement: What to share when, with who (Internal versus external) and how to share (INTELLECTUAL PROPERTY) move	(Note: all slides did contain a confidentiality mark)	(Note: all slides did contain a confidentiality mark)	(Note: all slides did contain a confidentiality mark)
THE CONTEXT	Scene set: Introducing the story chapters (CONTENTS / CONTEXT) move	Scene set: Setting out the scenes (AGENDA / CONTEXT) move	Scene set: Setting out the contents in relation to key FY19 priorities; Growth, People, Value attainment and Partner innovation (CONTENTS / STRATEGIC PRIORITIES/THE PLAN) move	Scene set: Setting out the contents in relation to key FY19 priorities; Growth, People, Value attainment and Partner innovation (CONTENTS / STRATEGIC PRIORITIES / THE PLAN) move
THE WHY	Introduction: Introducing the updates to the go-to-market offerings (WHY -increasing functionality and improving performance/closing gaps) move	Act-1, Scene-1: The analyst backdrop: Giving credence to the storyline about to unfold (THE WHY) move	Act-1, Scene-1: The market and competitive context / external viewpoint (THE WHY) move	Act-1, Scene-1: The market and competitive context / external viewpoint (THE WHY) move

THE WHERE		Act-1, Scene-2: 'Moving from to': the shift needing to be made (THE WHERE) move	(Note: implication of where emphasis needs to be applied to reach the targets laid out)	(Note: implication of where emphasis needs to be applied to reach the targets laid out)
THE WHAT	The reminder: What's new information/knowledge to be aware of (THE WHAT's NEW) move	Act-2, Scene-1: Telling the story: Simplify traditional, begin transformation, embed new services and process (THE WHAT) move	Act-2, Scene-1: The plan and how to achieve it (THE WHAT and THE HOW) move	Act-2, Scene-1: The plan and how to achieve it (THE WHAT and THE HOW) move
		Act-2, Scene-2: Explain what the transformation means (THE SUPPORTING THE WHAT) move		
THE HOW & THE WHO		Act-2, Scene-3: Explain the process of transformation, (THE HOW and THE WHO) move	Act-2, Scene-2: Focus on the people, hiring, retaining and cross-skilling (THE WHO) move	Act-2, Scene-2: Focus on the people, hiring, retaining and cross-skilling (THE WHO) move
RE-INFORCE THE WHY	Act-1, Scene-1: Re-state the storyline to reinforce the movement and steps required; Advise, Build, Integrate, continue to manage (THE RE-INFORCE THE WHY) move	Act-3, Scene-1: The re-state the storyline to reinforce the movement and steps required; Advise, Build, Integrate, continue to manage (THE RE-INFORCE THE WHY) move		
	Act-1, Scene-2: Reminder of the analyst backdrop (RE-INFORCE THE WHY) move			

THE TIMELINE / OBJECTIVES	Act-2, Scene-1: For each sub-section the detailing-out the timeline of offering developments (NOW, COMING SOON, COMING LATER) move	(Note: Implication of a timeline throughout the presentation (Move from past to future state; Traditional to Digital))	Act-3, Scene-1: The financial goals and objectives to meet by when (WHAT BY WHEN) move	Act-3, Scene-1: The financial goals and objectives to meet by when (WHAT BY WHEN) move
THE USE CASE	Act-2, Scene-2: For each sub-section the detailing out of the key patterns to be aware of and pay attention to (USE CASE PATTERNS) move	(Note: Case studies present but applied as evidence rather than use cases given the target audience)	(Note: examples given, but predominantly financial, and used as evidence given to audience)	
THE EVIDENCE	(Note: Client names used in Use Case. Pattern slides to highlight where solutions had previously been successfully applied)	Act-3, Scene-2: The example 'move': Show how the transformation was enabled for a previous client to establish credentials; Challenge, Solution, Results/benefits (THE EVIDENCE) move	Act-3, Scene-2: The financial performance actual and budget summary (EVIDENCE) move	Act-3, Scene-2: The financial performance actual and budget summary (EVIDENCE) move

Table 5-5: Rhetorical moves analysis of four practitioner recommended strategy conveyance documents

Table 5-5 above calls for further thought and explanation in how the texts analyzed relate to the sensemaking they should promote. The implications of the way the material is presented to differing audiences warrant discussion:

- **Document-1: Plan of Record/Plan of Intent Roadmap deck**. This document is used by the portfolio leaders (SGs) and offering managers (SMs) to notify the organization's internal Sales and Solutioning staff of updates to the catalogue of salable go to market offerings. The roadmap followed an internally approved structure and format and was presented on a virtual teleconference call, that was always audio recorded for internal replay. In particular, the document lays out any additional features and functions added to each offering, and any internally focused delivery improvements e.g., technical automation. The document communicates 'the what' in relation to offerings and the associated release timelines, but also future development direction planned for each offering. This document, as a reviewed and approved document was version controlled and released in a non-editable version to the Sales and Solutioning community and considered the single, definitive 'source of truth', implying the portfolio held the power in this conveyance event.

- **Document-2: Chief Information Officer (CIO) deck**. This document is an externally, client-facing document. Its intended use is to showcase the organization's saleable offerings by presenting an evidential view of the portfolio with relevant use cases that would resonate with the CIO of a client company. The document is crafted by the CPS portfolio leaders (SGs) with input from offering managers (SMs) for the Sales and Solutioning teams' consumption and onward presentation to their target clients. The language/lexicon used within the document is consistent with other documents and was targeted in business outcome/results terms that were intended to resonate with clients, but also in 'consultative selling' format that would be easily understood and translatable by Sales staff. This document is noteworthy in that it contained content that mapped to all eleven rhetorical moves.

- **Document-3: Financial Year 2019 Strategic Business Plan (FY19 SBP) written document.** This document was an internally focused, limited distribution document, for the organization's Board of Directors. The content of the document is highly focused on current, and then future planned, financial performance. The document positions the CPS group's performance against the market landscape and competition, moving then to discuss the coming 12-month plans and the actions necessary to achieve the future plans. The document is highly summarized, following a mandatory prescriptive company format. This document was written by the CPS

group lead strategist (this researcher), with input and review by the CPS leadership team (including SGs participating in this study) and was held up by the CEO as a quality example for the rest of the company to aim for. How compelling, or not, this document was would ultimately result in how much investment the company board would allocate to the CPS group for the following 12 months. The language and words used in this document truly mattered, the meaning the board members made from this document meant success or failure to CPS. Excepts of this document then formed components of the SGs strategy conveyance narrative to the SMs.

- **Document-4: Financial Year 2019 SBP supporting deck.** This document was a set of Microsoft PowerPoint slides that acted as visual support to the written FY19 SBP written document. Again, this presentation deck used a company defined format and expected content per slide. The number of slides was limited, 10 in total, and each slide corresponded to a section in the FY19 SBP written document. Each slide visually summarizes the corresponding section from the written document, but visually highlighted key points and low-lighted others for effect. Four of the slides inherited their content from the Roadmap (Document-1) and CIO (Document-2) decks which maintained the narratives (and therefore the trust) of the CPS leaders and Offering Managers.

In summary, confirming that the study texts represent archetypal examples of the strategy conveyance 'genre' both illuminates the types of texts associated with strategy conveyance, and the rhetorical moves held within them. An added benefit of applying genre analysis to this study's texts also gave me another perspective on the content within the texts, highlighting the way the sensegivers and sensemakers viewed their use and the tensions inherent in them. Also of note was the inter-relatedness of the documents with key diagrams (e.g., the 'House' slide (Figure 4.6)) often reused within each text and a level of consistency of how tensions were depicted/codified throughout the texts analyzed.

An understanding built, with the SGs considering the strategy texts as supporting the strategy narrative, while the SMs considered the texts potentially useful but open to miss-interpretation and often in need of questioning. This noted difference between the SGs and SMs continues when looking at the visual components of the texts in the next sub-section (5.2.3.2).

5.2.4.2 Focused Code: Visuals

Looking next at the visual representations within the strategy texts and observation of their presentation, the CPs talk about their use of pictures, refer to the drawings on slides or use visual signals in support of the slide content to add depth to the narrative. The evidence suggests that SGs and SMs have differing views on visuals and the visual diagrams contained within texts. The SG perspective on visuals being one of strategy conveyance, e.g.,

"if I've done a decent job of you know, painting the picture and articulating where we need to get to and why, a few of them will get it" [CP7-SG, Interview-1].

Though by implication this SG appears to think/feel that not all the SMs they communicate with will understand what's being conveyed, and/or what is expected of them in relation to the strategy. Potentially this is a SG recognition that understanding cannot always be achieved in every telling of the strategy story.

The next quotation qualifies that SGs expect to facilitate discussions in relation to the conveyance of strategy using both narratives and supporting texts in the form of presentation slides.

"so that's not, that's not necessarily erm, a function of you know, written communications erm versus presentations or, or visual depictions, it's more a function of, of erm discussion and engagement and Q&A and that typically is facilitated by presentations" [CP3-SG, Interview-1].

Now turning to the sensemakers, the CP-SMs use visual pictures instead to help them interpret and make meaning, e.g.,

"Yeah, I draw pictures, I… (Researcher: yeah) Yeah, so, so, when, when I'm actually trying to, to think about what… what I'm doing and, and in terms of, you know, creating the, the offering, creating the scope of the offering (Researcher: yeah), um, I'll, I'll generally kind of do that in PowerPoint. I think in pictures. And once I begin to develop some pictures of, you know, what the marketplace is or what the demand (Researcher: mmhmm) is or, you know, you know, what are the key strategic objectives of the offering, um, I tend to find that… personally, I, you know, I, I start with some pictures in PowerPoint and begin to craft the story around that. And it gets more and more and more detailed (Researcher: right) as I iterate through it. (Researcher: okay, so…) That's, that certainly how I work." [CP8-SM, Interview-1],

"the way I work is, um, I kind of visually, uh, in my mind, kind of put the pictures together"
[CP9-SM, Interview-1].

Given the visual nature of strategy conveyance texts, as evidenced in the quotations above, I began to wonder if a trait of people who choose to work in portfolio/product management functions are all visual thinkers? In side-conversations with the majority of my conversational partners and other portfolio practitioners I asked their opinions. Interestingly, every single one of them classed themselves as visual in some way. If time and resources had permitted, I would have liked to follow this thread further to understand how being a visual person, or not, affected understanding of the strategy being conveyed.

Texts then are valuable supporting props for the SGs when conveying strategy but are not always viewed in the same light by SMs. Maybe one of the reasons for this difference in opinion between SGs and SMs is the tensions portrayed within the texts, evidence of which is illustrated in the next sub-section (5.2.2.3).

5.2.4.3 Focused Code: Depicted tensions

When analyzing the texts selected by the organizations practitioners it became apparent that the texts were not only conveying the necessary strategies, but the words (language and lexicon), metaphors and diagrams used within them were also conveying tensions, see Figures 5-8 and 5-9.

Note: Figure redacted for confidentiality.

Figure 5-8: Appearance of tensions in texts (1)

Note: Figure redacted for confidentiality.

Figure 5-9: Appearance of tensions in texts (2)

There were no lack of tensions emerging throughout the data gathering iterations from interviews, observation, or the analyzed texts and, with so many tensions emerging from the data knowing how to choose which tensions were the important ones to follow became an iterative task. Ultimately the data drove my choice of key tensions to follow and was based on a collective approach of re-listening to the audio files of the interviews, revisiting the texts, following the GTM coding refinement process to code saturation, and conducting member checking (Birt *et al.*, 2016).

5.2.5 Thoughts on narratives and texts: Returning to the literature

Narratives and language are a fundamental component of strategist's discourse and activities (Dameron and Torset, 2014; Laine and Vaara, 2007) and further Dameron and Torset (2014, p. 295) argue in their study of reflexive discourse on strategy using a paradox lens, that strategists enable tensions when depicting their work, and in doing so "construct subjectivities for themselves and others", i.e., that strategist's discourses about strategy work are sensegiving activities.

We are aware that strategy texts are a foundational part of a strategists 'doing of strategy' work (through the linking of materiality and strategy (Dameron, Le and LeBaron, 2015; Jarzabkowski, Spee and Smets, 2013; Kaplan, 2011), and interestingly strategy texts (documents, strategic plans, presentations) are notoriously full of both words and diagrams, with the world of business strategy having numerous examples of such diagrams for both building and communicating strategies, see (Grant, 2008; Cummings and Angwin, 2015; Mintzberg, Ahlstrand and Lampel, 2009). Typically though, the study of visuals focus on what can be seen by people and the methods for researching visuals deal with media (TV, film, broadcast programmes), photographs, web/online sources (Prosser, 2011) and audio-visual materials (Figueroa, 2008), rather than diagrams that are included as visual representations within documents. Barbera-Tomas *et al.* (2019, p. 1809), in their article on social entrepreneur's use of visuals to affect emotions, state that visual images "signify meaning more holistically and communicate sensory experience better than verbal text". However, little academic research refers to or discusses these diagrammatic inclusions within the wealth of practitioner-based organizational strategy texts suggesting a notable gap in the current field of knowledge.

If narratives and discourse carry tensions, texts are considered a written form of language, and materiality and strategy work are connected (Kaplan, 2011; Jarzabkowski, Spee and Smets, 2013; Dameron, Le and LeBaron, 2015), I'd argue that strategy texts are also laden

with tensions, backed up by evidence from this study, presented above. With the call to extend SAP research made (Kohtamäki *et al.*, 2022), further understanding how tensions and the field of paradox in relation to strategy texts would be a useful exploration to extend knowledge further.

5.2.6 Summary: Finding 1

As a reminder the research question that finding-1 relates to is:

- Question: How, and when, are tensions conveyed through the medium of narratives and texts?

Section 5.2 is the first of three sections presenting the emergent grounded theory of the portfolio strategy conveyance process and presented the role of two sub-categories: Narratives and Texts, both of which surfaced extensive numbers of tensions, both verbal within the narratives, and depicted within the texts, and the focused code: Meetings.

How and when tensions were conveyed through the medium of narratives and texts were discussed and evidence offered. The strategy texts used by SGs in meetings, and from the onset, especially the Microsoft PowerPoint presentation decks, told stories full of conflicting information that needed to be supported by an associated narrative to make sense for the SMs. Those same SMs consider the texts potentially useful but open to misinterpretation and often in need of questioning implying the tensions don't immediately resonate with the SMs. The SGs though consider the strategy texts as supporting the strategy narrative especially given the reuse of texts and key content in the meetings over time (see sub-section 5.4.2). So, the problem with strategy conveyance is that the tensions are made manifest by the SGs but the SMs are not always able to process the implications at the time they are conveyed. This implies that either the tensions are likely to get in the way of action, and/or that the start of the conveyance process raises a set of emotions for the SMs that may or may not hinder their actions.

Standing back now and reflecting on this section, you could say I found what I expected, tensions, within both the narratives and texts. However, what also became apparent, and was surprising to me was the importance of metaphors in the structuring of those tensions as they emerged within the organizational spaces of conveyance. This suggests that metaphors don't just have meaning as part of the strategy conveyance but appeared to position the tensions making them salient at points throughout the conveyance practices/process.

Additionally, I'd also argue that the evidence presented in this finding (Finding 1) articulates a nascent genre of documents (Swales, 1990), recognised within the study organization as IT portfolio strategy conveyance documents, that shape the internal epistemic culture (Knorr Cetina, 1991). These documents exhibit a distinct set of rhetorical moves and associated features summarized as a supplemental finding:

Secondary finding 1a: IT Portfolio strategy conveyance texts contribute towards a unique genre with a distinct set of rhetorical moves and associated features. The predominant vehicle for the presentation of these texts is that of Microsoft PowerPoint presentations which, as visual artefacts, open the possibility of more creative interpretation of strategy and allow for continuity and change as fast-moving industries strategies evolve annually.

The next section (5.3) continues the presentation of the emergent theory by detailing the concept of the organizational spaces supporting finding 2.

5.3 Finding 2: Conveyance spaces as flexible containers of experience

The second finding pertains to the supplemental question: How are tensions experienced and become relevant for the Portfolio leaders (as SGs) and Offering Managers (as SMs)?

The finding for this question is stated as:

For both the sensegivers and sensemakers, tensions become relevant throughout the conveyance of strategy in a series of interrelated and evolving flexible 'containers of experience' (organizationally constructed spaces) over time.

The 'pathways' for SGs and SMs are related and inter-connected, but have perceptual differences as described below even though both pathways are bound together, e.g.,

- Sensegiver spaces: four primary sensegiver spaces were identified as part of the pathway each serving a different function - to convey initial strategy; to allow for questions; to think through implications; to validate actions (Figure 5-10),
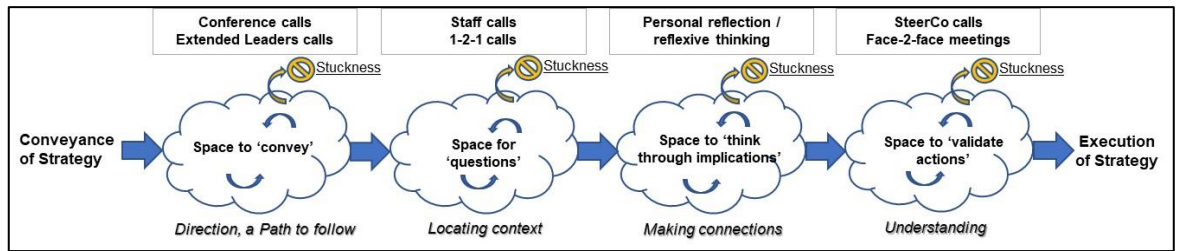
Figure 5-10: Sensegivers perspective of spaces

- Sensemaker spaces: five spaces emerge as a result for sensemakers, four that parallel the SG process above (Figure 5-10) and one additional space post the sensegiving-sensemaking interaction that is largely related to translation into action.

- The sensemaker spaces are to listen, to check understanding, to think through implications, to confirm actions, to communicate and act (Figure 5-11).
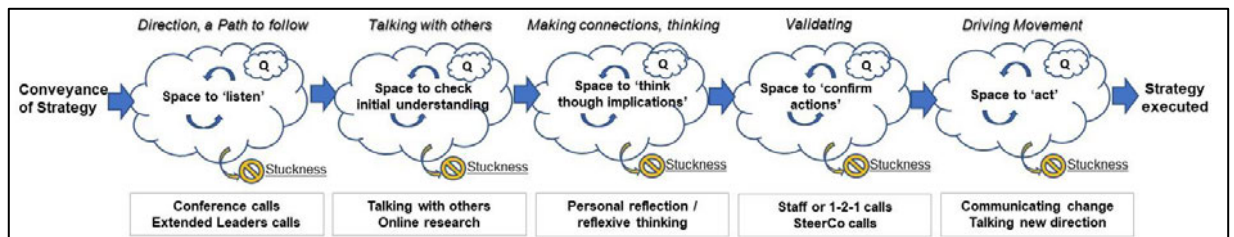
Figure 5-11: Sensemakers perspective of spaces

In this section (5.3), I present **Category 3: Spaces** comprises five sub-categories and one focused code: Stuckness, which contributed to the construction of this finding (Figure 5-12). Tensions are inherent throughout sub-categories 1-5 of **Category 3: Spaces** and are presented within each sub-category where they emerged. The compound of all tensions is covered in **Category 2: Tensions** within sub-section 5.3.2 below.

Category 3: Spaces (of the strategy conveyance process) is created from the following subcategories and focused code:

Sub-category 1: Direction, having a Path to follow,

Sub-category 2: Locating context and talking with others,

Sub-category 3: Making connections, thinking,

Sub-category 4: Understanding (made) and validating,

Sub-category 5: Acting, and,

Focused code: Stuckness.
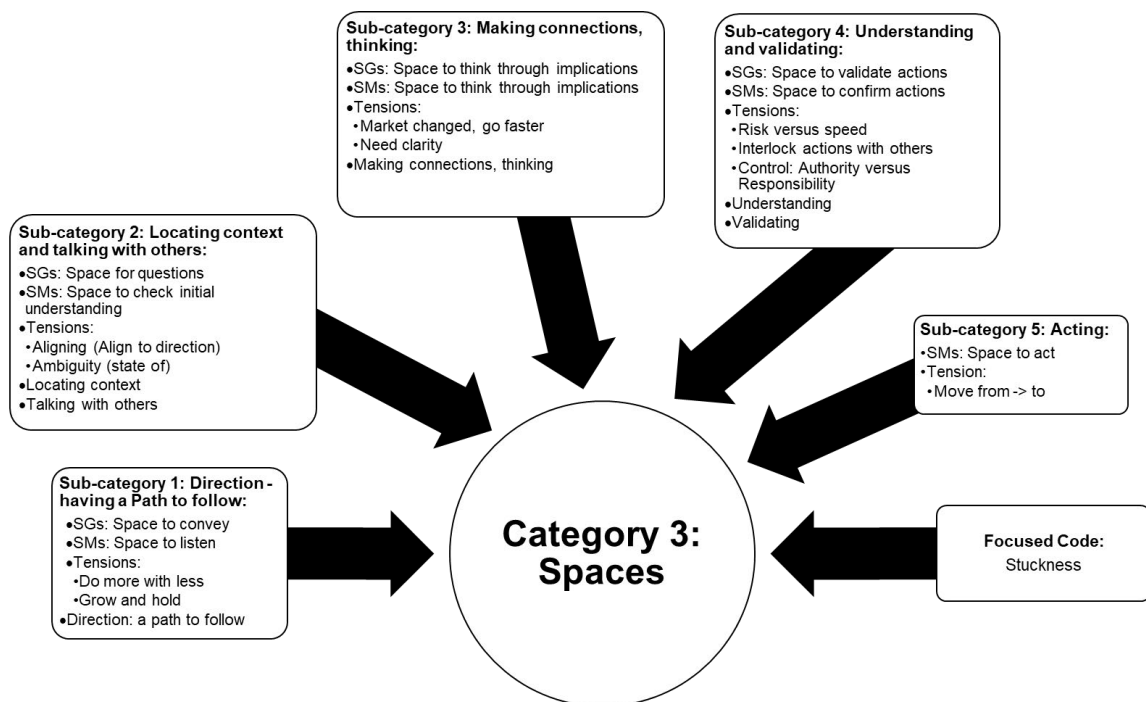
Figure 5-12: Codes to Category 3: Spaces

I now present Category 3: Spaces, its five subcategories and one focused code.

5.3.1 Category 3: Spaces

As stated above the category 'Spaces' is an amalgamation of five sub-categories, the first four are joint SG and SM spaces, while the fifth is predominantly (though not exclusively) the realm of the SMs. Each sub-category represents a 'container of evolving experience' for the SG and SMs, each with its own tensions and characteristics.

The concept of organizational space and organizational spaces as process (Stephenson *et al.*, 2020) is returned to in Chapter 6 (section 6.4).

5.3.1.1 Sub-Category 1: Direction, having a path to follow

This sub-category was constructed from the narratives of the CP-SGs during their conveyance of strategy (via narratives and texts) and the CP-SMs related experience of 'listening' to leaders (as sensegivers) imparting strategic direction.

Two distinct spaces with two associated tensions and a foundational focused code, Direction, emerged (Figure 5-13) and were coded as follows:

- SGs: Space to convey,

- SMs: Space to listen,

- Tensions:

    o Do more with less,

    o Grow and hold,

- Focused Code: Direction: a path to follow (Conveying and notifying of the path forward).
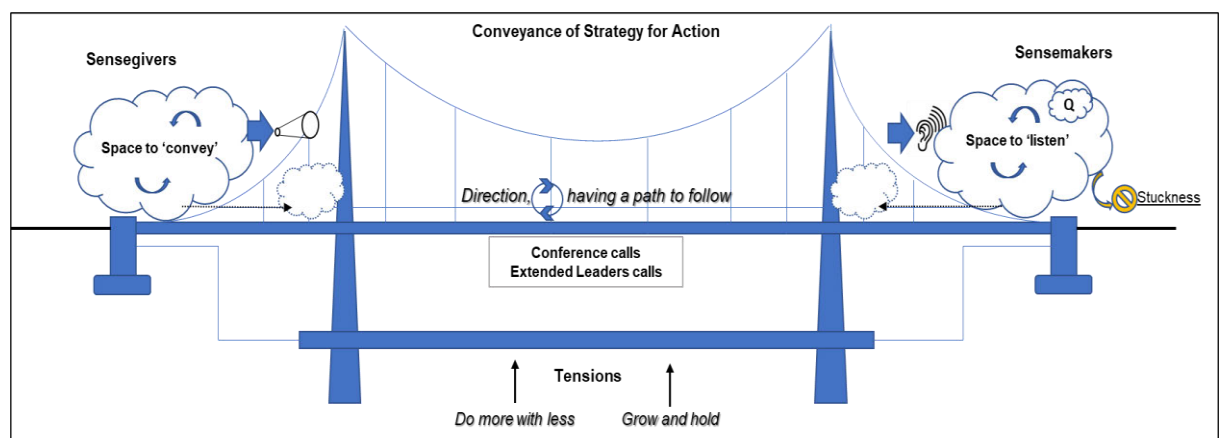
Figure 5-13: Sub-category 1: Direction, a path to follow

Each of the codes are now discussed in turn.

SGs: Space to convey

A common narrative of the sensegiving CPs was that of using regularly scheduled meetings in the form of virtual conference calls as a primary vehicle, often supported with the use of Microsoft PowerPoint slides (texts), to convey strategic messages and important directional

items (Memo 2). These meetings were seen by the sensegivers as a form of space that enabled the sharing of information, but also to facilitate questions from the sensemakers attending the calls.

Memo 2: Space to convey

> *Although not explicitly stated by any of the sensegivers there's an innate understanding that meetings, conference calls and review calls (often referred to as SteerCo calls) are not just the physical mechanism, but the place (as in space) where the sensegivers communicate strategy and strategic direction. The way this organization works is a never-ending series of virtual teleconferences (very few face-to-face meetings occur) where the sensegiver imparts the strategic narrative based on a top-down flow of messaging, directional alterations/changes, market dynamics and new approaches. Given the virtual meeting context the narrative is usually supported by a Microsoft PowerPoint deck of slides to help visualize the strategic narrative including the who (those sensemakers attending the calls) the what (the direction), the why (e.g., market has changed), though interestingly not always to the how (the next steps or tactical actions).*
>
> *" I have a series of weekly and then bi-weekly meetings umm, setup to 1) make sure that I over communicate the vision and the strategy, provide details about both where we are financially and how we are performing as a group"* CP6-SG, Interview-1.

The space to convey was articulated in a couple of ways by sensegivers. Firstly, as a place in which to test and hone the telling of the strategic message described by CP2-SG as:

"a couple of months down the road (colleague name) and I started going and talking to teams and little by little things happened. … I did a couple [of presentation training meetings] and then that led me to "Okay, now I'm starting to see where the talk track goes." [CP2-SG, Interview-3],

and secondly as an opportunity to filter the communications to make it more relevant (i.e., SGs selecting for relevance, improving focus, and narrowing the potential field of conveyed tensions) for the Offering Managers (SMs) e.g.,

"if the communication has a lot of information about our Application Services business or Network business or our Data Center Services business some of that may not be applicable to my team so I would [pause] erm discard that information and only focus on the things that I believed to be directly applicable to my team so that they could get focused on the task at hand" [CP3-SG, Interview-1].

The regularly scheduled meetings (SteerCos, Staff calls, Extended Leaders calls, etc.) all had a pre-defined format/flow and agendas, a cadence of occurrence (weekly Staff calls, Monthly SteerCos, and Quarterly Extended Leaders calls for example), only one-to-one calls were unstructured. Regardless the Portfolio practitioners understood what the purpose of each meeting type was based on the naming convention of the meetings e.g., SteerCos (shortened version of the term 'steering committee', where progress against plans and roadmaps was checked, challenges discussed, decisions made on go-to-market offerings etc.), and that they could attend or replay an audio recording later of many of the calls, and the type of information and discussions that would occur. Participants were also urged to ask questions to make the meetings interactive and aid their understanding of topics presented/discussed, and even encouraged to bring up topics or challenges they needed help with, or decisions taken.

All the meetings, brought to life by the SG narratives and strategy texts, which were generally pre-approved and standardized, were a strong influence of the conveyance practices. These narratives and texts were the preliminary vehicles utilized to raise awareness of both the portfolio strategy, but also surface early awareness of the tensions in relation to the first organizational space (Direction, a path to follow).

SMs: Space to listen

The predominant narrative of the sensemakers was that of hearing the messages on a call, supported with seeing the PowerPoint visuals. This enabled for the SMs a 'space to listen', but also a state of mulling those messages over in an interlinked 'space to think' (see sub-section 5.3.1.3 below for the discussion on 'space to think'). The 'space to think' overtime links the 'space to listen' and the 'space to convey' i.e., a cycle of convey, listen, think, ask questions, reconvey, listen, think, etc. It is also the first SM articulated apprehensive thought

(Voronov and Yorks, 2015) that they raise of a possible tension ('Grow and hold') and one they will have to get to grips with, as CP11-SM, Interview-1, states:

"Usually I like to hear what somebody has to say and, provided it's not a strategy that must be implemented ASAP – you know, we've had a few of those – I will take a week and just kind of focus on what I've been doing, and in the back of my mind I will be thinking about the, the new bullet points that I need to be figuring out how to weave them into what I'm doing."

This 'space to listen' exists simultaneously with the sensegivers 'space to convey' as a direct result of the sensegivers need to convey strategic information and direction, the 'why', to their sensemaking Offering Managers. As a reminder the sensegivers are the leaders who have responsibility for the organizations product/services portfolio of go to market offerings and as such they act as guides to their portfolio teams, transferring and translating (Carlile, 2004) the abstract business strategy into the more specific language and actions the Offering Managers (SMs) are responsible for driving and executing. The sensegivers although generally transferring the essence of the business strategy, at times they will have to perform translation for the SMs to help them cross the boundary of new knowledge (Carlile, 2004). This new knowledge will have differences, potentially unclear dependencies, and even ambiguous meaning that the SGs will need to help the SMs interpret and understand.

Sensegivers had expectations of themselves within the 'space to listen' from the point of view of understanding concerns the sensemakers may have with the strategic messages conveyed,

"if you're listening intently enough to what they're thinking, what they're feeling or what they really mean you'll typically know what they're concerned about" [CP7-SG, Interview-1],

and sensegivers prior to conveying to their Offering Managers often also talked about their experience as sensemakers captured in Memo 3.

Memo 3: Space to listen

Sensemakers in this organization expect to receive information via virtual teleconference calls/meetings. The sensemakers inherently expect sensegivers to impart strategic direction, vision and strategies via this mechanism effectively seeing these meetings as a 'place' for sensegivers to communicate the strategic narrative and as a 'place' to listen to what is said.

> CP-SM: *"I think that, um, the formal team meetings do provide the information,"* [CP12-SM, Interview1].
>
> *The sensemakers also expect that strategic narrative to be supported with the use of a set of Microsoft PowerPoint slides that illustrate the why (the strategic imperative, e.g., market has changed, competition is increasing etc.), the what (the direction in the shape of a future state vision and/or objectives), but interestingly the SM's don't seem to expect the how (the tactical actions or next steps).*
>
> CP-SG (talking as SM): *"I think you and (leaders name) and the team have done a very good job of putting the strategy down into a handful of slides, to be quite honest. I think it's, it's pretty clear... um, what we're trying to do, the areas of focus of course, understand why the areas, these are the areas of focus"* [CP1-SG, Interview3].

Looking deeper into Memo 3 you could be forgiven for thinking the 'space to listen' is just somewhere to hear the sharing of information, however the sensegivers are really attempting to convey a need for change in terms the Offering Managers are comfortable with (market, competition etc.), and this isn't a one-way delivery by the SGs, they want the SMs to question (see 'space for questions' in sub-section 5.3.1.2 below). You could say in the bigger picture, this initial step of the SGs and SMs towards each other across the bridge is an attempt to acclimatise the SMs to the broad parameters of change, so that they are primed to think about it in their local context. Looking to the literature, this is a sensitising activity in the sensemaking process that provides salient cues (Knight and Paroutis, 2017).

Tensions: 'Do more with less', and 'Grow and hold'

Within the initial set of spaces articulated by the SGs and SMs ('Space to convey' and 'Space to listen') two predominant tensions described as (issues, challenges, concerns, hinderances) resonated from the data (and were predominant for both the SGs and SMs), that of the need to 'Do more with less' and to enable growth while holding market position ('Grow and hold') with the existing service offerings already in delivery to clients. These two tensions were often seen within the texts (especially within the PowerPoint slides) used alongside the strategic narratives and acted as a reinforcement of the challenges in the minds of the SMs. The tensions within these initial spaces were akin to Ambidexterity tensions (Andriopoulos and Lewis, 2009; Gregory *et al.*, 2015) discussed briefly in Memo 4, and/or the performance orientation of the developmental space paradox where activities such as accelerating, results driven and looking forward have been highlighted by Derksen *et al.* (2019).

Memo 4: Ambidexterity tensions

> *The narrative of the portfolio development conversations partners (both CP-SG and CP-SMs) is one of ambidexterity paradox, and that of exploration and exploitation. Items such as 'grow and hold' and 'do more with less' imply that two actions need to be performed simultaneously, and in the minds of the practitioners are inseparable, even though they are at odds.*
>
> *A core strategic message conveyed is stated as*
>
> "In FY19 CPI will grow digital and next generation offering revenue by 27%, while holding traditional ITO services revenue at 3% decline" [Document: Appendix2a],
>
> *which appears contradictory but is talking about the two parts of the business simultaneously.*
>
> *Do more with less is related to the need to develop new services offerings or new features for existing offerings, but with no additional budget or resources to do so, but it's imperative that new offerings are developed to meet the market demands. Grow and hold is similar in that it's stating the need to grow service offering revenues while also maintaining currency of exiting offers (holding onto current revenue streams and clients). This duality is seen as a recognized challenge e.g.:*
>
> "so I usually will actually explain that we need to find the appropriate balance between two seemingly opposing things" [CP6-SG, Interview-1].

The SG and SM recognized tensions of 'Grow and hold' and 'Do more with less' are characteristic of exploration/exploitation tensions and, as previously stated in sub-section 5.2.1 (Narratives: Metaphors and analogies) are surfaced through the metaphorical language applied i.e., attempting to hold the positive and negative in balance.

Focused Code: Direction: Conveying and notifying of the path forward

Direction is a foundational focused code that emerged in the early conversations with sensegivers and continued to dominate throughout the data gathering and analysis phases (interviews, primary texts, and Strategy workshop observation) as seen in Memo 5.

Memo 5: Conveying direction, notifying direction

Direction seems to be both an assumed under-current and a primary topic throughout the conversations, observations, and primary texts. SGs narratives resonate with the need to convey a sense of direction to the SMs. They (SGs) talk about imparting information that is laying a pathway to follow, trying to impart a sense of urgency, of movement, of future state and ultimately understanding so action occurs to effect the strategies.

" I think part of my role is to navigate that, figure out what those messages are, interpret that direction for the team and then give them direct guidance so that erm, you know they can, they can achieve the results that, err, our leadership intended." [CP3-SG, Interview-1].

There's also a level of interpretation the SGs feel duty bound to synthesize the strategy into conveyable messages they feel are relevant to their SM audience as one SG suggests,

"so strategy is set at multiple levels within the whole company so, corporately from an (RemainCo) perspective there are strategies and directions that (CEO) sets [yeah], that then filters down to each business unit, Enterprise Services, (EVP) who's the leader of that organization then has a set of strategies and direction that he then communicates which tie back to the corporate ones but are factored in a way that makes sense for his organization in the services space and then, that then gets re-factored down at the offering, the Practice level, depending on which Practice, erm, and depending on what their particular remit is." [CP5-SG, Interview-1].

The whole conveyance of strategy is one of imparting direction and the texts also seem to act as a supporting form of notification of strategic direction (i.e., change), acting to re-enforce the narratives conveying the strategy:

"Be #1 Hybrid IT service provider, offering most complete set of enterprise grade IaaS & PaaS services to empower transformation." [Text: Slide-4, Document 01-FINAL-Appendix 2b FY19 CPI Presentation].

Direction though is more than just conveying and notifying of a path forward (of a change), but also appears to surface the fact that the SGs are still working things out for themselves in relation to the top-down stream of strategic messaging. Effectively the SGs are also simultaneously SMs at key points in time through the conveyance process,

"if you take those two dimensions and create a matrix which says, you know, your business objectives are gonna fall into cost, growth and risk, and the human dynamic associated with it is either gonna be operating from a position of greed or a position of fear right, you can quickly start to figure out and you can quickly start to slot, you know, what, what's the story at." [CP2-SG, Interview-3].

As the SGs understand they begin to refine their own version of the strategy narratives and re-factor so they can convey to their Offering Managers something more consumable and relevant to developing and maintain go-to-market offerings,

"there's a lot of me changing the way that I communicate so that it hits with the development team, and it hits with the delivery team so that they can understand what it means." [CP6-SG, Interview-1].

An SG's skill in being able to 'read' the potential responses to tensions, such as business objectives versus emotional (greed or fear) may be useful when onward conveying strategy. They may be more attuned to the need to alter their messaging for various staff or more able to **anticipate** the concerns the telling of the new strategy may raise for SMs. **Reflexivity** as an SG practice in the strategy conveyance process may go a long way toward a well-received strategy by the SMs.

5.3.1.2 Sub-Category 2: Locating context through talking with others

The second sub-category was again constructed from the narratives of the sensegivers during their conveyance of strategy (via narratives and texts) and the sensemakers related experience after listening to the sensegiver messaging of new strategic direction. The key insight from this sub-category is the sense of context the sensegivers attempted to give their Offering Managers, while those OMs (as sensemakers) look (through talking with others) for where they 'belong' within the conveyed context as a way of deciding whether action was necessary.

Two distinct spaces with two associated tensions and two focused codes, 'Locating context' and 'Talking with others' (Figure 5-13) emerged and were coded as follows:

- SGs: Space for questions,

- SMs: Space to check initial understanding,

- Tensions:

    o   Aligning (Align to direction),

    o   Ambiguity (lacking clarity),

- Focused Code: Locating context,

- Focused Code: Talking with others.

Each of these codes are now discussed in turn, below.
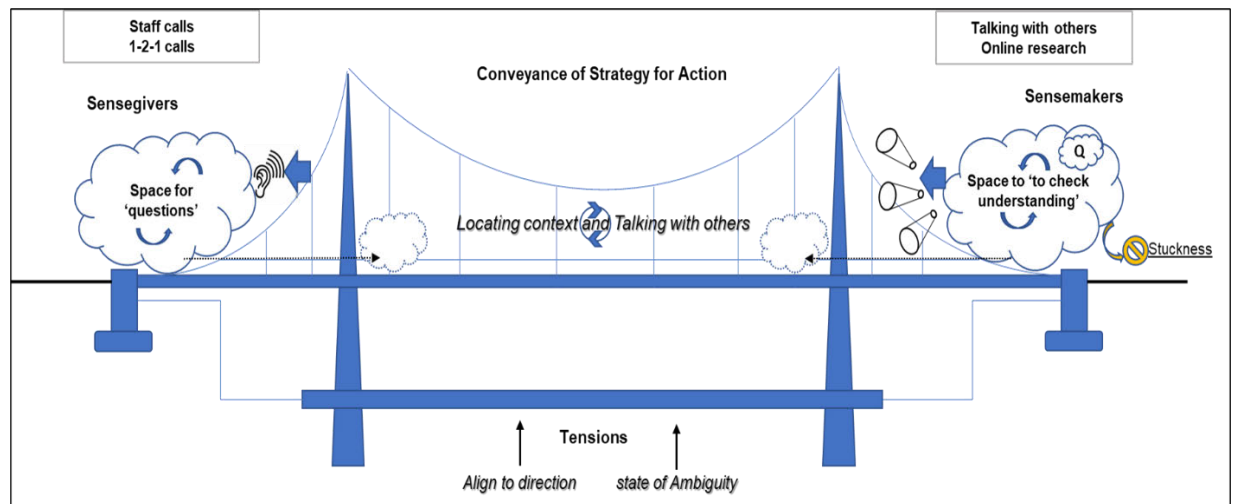
Figure 5-14: Sub-category 2: Belonging, locating context through talking with others

SGs: Space for questions

This is a space SGs actively initiate, whether in the form of a scheduled team meeting or a one-to-one meeting and should be thought of as a space to actively promote dialogue (Derksen *et al.*, 2019). The SGs fundamentally expect their Offering Managers (SMs) to ask questions throughout the 'delivery' of the narrative and presentation texts of the strategic direction. Asking questions and enquiring are said to be components of the sensemaking orientation within developmental spaces, (Derksen *et al.*, 2019).

The SG's do expect that the space they have enabled is one SMs should use to question, to clarify meaning and gain further understanding, but are often surprised just how little the SM's use that opportunity. However, SGs appear to understand that SMs don't understand everything needed in the initial conveyance of the strategy and when the SMs do eventually ask clarifying questions even several times, the SGs exhibit a great deal of patience (Memo 6). The SGs expectation for questioning and the patience in answering the SMs could suggest a culture around the strategy conveyance process that requires confronting tensions

enroute and working out how to transcend them, rather than accepting the tensions and letting them lie. This brings to mind Lewis (2000, pp. 762, Figure 1).

Memo 6: Space for questions

There's an inbuilt expectation from the sensegivers that the sensemakers they are communicating with need to ask questions to clarify their understanding, to aid their meaning making and figure their way through the implications of what's been imparted verbally or visually (on PowerPoint slides). As CP2-SG, Interview-1, states:

"it could then be helping them with the right questions to ask or whatever to identify those opportunities."

If a strategic direction is conveyed, then surely questions from sensemakers should be expected...?

The sensegivers want their teams to ask questions and want to facilitate opportunities (spaces) for the sensemakers to question whether directly or behind the scenes. Sensegivers also want questions to help them refine their telling of the strategic narrative!

"I mean you're talking on a daily basis you're meeting on a regular basis, you're you know occasionally actually getting face to face time, umm, and I think through that there's much more of a two way communication so, even though maybe the way I present or communicate to the team is in a certain style umm, I think you then get that interaction of people you know, the sort of the way, ask questions or the way they interact, that starts to maybe either highlight areas where I haven't explained enough or we need to go deeper ..." [CP1-SG, Interview-1].

Interestingly though the sensegivers often commented that the sensemakers were not always forthcoming with questions in the group meetings, so instead some of the sense-givers actively create intimate space for questions, i.e., the opportunities for sensemakers to really ask the questions they need to in a 1-2-1 setting,

"what I typically do is create one-on-one time, erm, so there's the initial communications and then there's one-on-one time where individuals can if you like, a fairly safe environment, um, err, easily urm, reflect on what's front of mind for them. And it's usually it comes through by the questions they ask, you can, if you're listening intently enough to what they're thinking, what they're feeling or what they really mean you'll typically know what they're concerned about" [CP7-SG, Interview-1].

Sensegivers do also voice concern that even with the spaces available to the sensemakers that the message isn't 'heard' and that's a hurdle to overcome,

"It may not still happen, and people still may not listen, and people still may come back to you and ask the same question eight times over and it's just the way it's gonna be. But I, I think a lot of this is, once the strategy's set, get it, get it institutionalised" [CP2-SG, Interview-3].

So, sensegivers actively promote spaces (in the form of meetings, 1-2-1 sessions etc.) for the sense-makers to ask questions of the telling of the strategic narrative, in fact the sensegivers want the sense-makers to question not only to improve their

> *(SM) understanding but also to help them (the SGs) improve their telling of the strategy.*

Could it be that what I'm hearing/seeing is that the qualitative nature of the space is not ideal for this interaction between SGs and SMs in some way or is it that the SMs need further time to process the previously delivered narrative? Given that we already know that there's a time-lag (Bromley, 2010) and gap (Dervin, Foreman-Wernet and Lauterbach, 2003) between sensegiving and sensemaking, its highly likely the SMs need more time to make sense of the conveyed strategy and its tensions and/or implications for their daily action than the SGs recognize.

SMs: Space to check initial understanding

This is very much a sensemaker 'space'. The sensemakers want, some would say need, to question what they have heard (and seen in the PowerPoint slides) from the sensegivers. The way sensemakers framed this need to question was through talking, talking with others whether their leaders (SGs) or their peers (other SMs).

"I think that, um, the formal team meetings do provide the information, but I think you need to discuss it with others. Because, again, to the point I made earlier, when you read a presentation, you can interpret it the way that you think that you would interpret it because of the way that your social conditioning, etc… And again, when you're on staff calls, if you… You listen to the information, and if there are topics that you think "Did I understand that correctly? What do I think about that?" you might talk to your peers around, about it, or to your manager, and say, "Well, actually, I didn't understand it," or, "This is my interpretation. Does it really mean this?" So, yeah, extend it out and talk with other, um, colleagues." [CP12-SM, Interview-1].

This talking with others that the SMs do also allows for a sense of psychological safety in peer conversations (no one wants to appear foolish) before further discussions with SGs, and it starts to crystallise the sensemaking and create plausibility (Weick, 1995; Weick, Sutcliffe and Obstfeld, 2005).

Even though SG's enable a space for SMs to question for further understanding of the strategic direction, SMs often chose to enable an alternate space for themselves 'Space to check initial understanding'. Oddly many of the SMs reported they would talk first with a peer, rather than in a group setting with the SG present, to check what they had heard and

whether they had taken similar meaning from the conveyed messages. This 'talking with others' appears to help the SM locate themselves within the context of the conveyed strategic direction and then to move on towards a space for reflection. Checking with others does several things in relation to tensions as it allows the SMs to improve their meaning making, aligns on perspectives, and re-enforces their belonging, all of which are part of the sensemaking process.

Only after talking with peers do the SMs potentially talk with their respective SG to gain even further clarity of understanding. As previously stated above, the implication here then is that there is a time-lag (Bromley, 2010) between the SGs conveyance of strategic direction and the SMs ability to reflect on what they have heard, i.e., "action is always just a tiny bit ahead of cognition" (Weick, Sutcliffe and Obstfeld, 2005, p. 419). We know there is a temporal disconnect in the sensegiving-sensemaking process (Gioia and Chittipeddi, 1991) but there is limited literature on the nature of these sensemaking time-lags for interpretation and meaning-making. In short, the literature doesn't appear to consider the practice implications in relation to SAP, and the evidence from this study is suggesting that SGs would do well to recognize they need to allow time, due to the sensemaking lag, for the SMs to make sense, and, put in place a plan to manage for that time-lag to allow the conveyance of sense more effectively.

"Yeah, yeah. Oh, yeah. You know, talking… We have a regular leaders' call that we go through any questions. But again, you know… And I also have regular one-to-ones and I always say exactly what I think about certain things. And in fact, I had a conversation yesterday about something on (Leaders) staff call last week. So, yes, definitely." [CP12-SM, Interview-1].

The sensemakers did articulate a time gap between the first telling/hearing of the strategic narrative and the questioning made by sensemakers (whether back to the SGs or with other SMs). The SMs don't always ask questions immediately as they reported the need of processing time to think through the messages and/or are not always confident to pose the questions to their leaders immediately.

"I actually, that's when I pick up the phone and call (peer's name) and start having a little pow-wow. I go back to my, my previous network. Sometimes I will ask if (Leader's name removed) has a call because she almost always… Her calls are not immediately after, which is great. Um, an announcement, she usually does 'em about a week later. And I don't know if she does that intentionally or if it's just the way it works, but that way, you're a little bit better prepared to think.

The informality of chit-chat, the back and forth in a setting that is less formal seems important in terms of the conditions in this space. Other characteristics of this space are firstly one of the sensemaking timing process, and secondly, the ability for an SM to obtain a level of comfort that their thinking is valid. It's hard to deal with tensions if you are not comfortable in your own position.

You know, you've kind of had the thinking process. And then you can throw the questions back at leadership and say, "Okay, now it's not clear to the Indians. Go have a conversation up the food chain because this is not making sense." Um, or "Did you think about the following three things?" Um, but it's almost always for me not so much that that happens, um, because like I said, for me it's not yet a comfort level to throw certain items back and say, "Did you think about alternatives?" I usually go through (peer's name removed) and think through it and see if I can get a better understanding from her. Um, or (peer's name removed). And we just kind of chit-chat about those things and figure out what we can change, what we have impact on." [CP11-SM, Interview-1].

The sensemakers need/want an opportunity to ask questions of themselves and of others (both SG and SM). Wanting an opportunity to talk with others and ask questions appears fundamental to the SM's ability to gain both a sense of belonging as they navigate tensions (Smith and Lewis, 2011), and an understanding of the strategic narrative and texts.

Now before moving on to discuss the two tensions ('Aligning' and 'Ambiguity') associated with this space, Category-2: 'Locating context through talking with others', it's worth commenting on the difference between the tensions 'Do more with less' and 'Grow and hold' of the first space, Category-1: Direction, having a path to follow, and this second organizational space. In the 'Direction' space, the tensions of 'Do more with less' and 'Grow and hold' are clearly tensions of contradictory requirements that exist at the organizational level, because they serve organizational interests. While in the second space the tensions are more representative of emotional/cognitive responses that arise at the personal level because those individuals are now charged with some action.

Tensions: Aligning and Ambiguity (lacking clarity)

The tensional aspects of the spaces 'Space for questions' and 'Space to check understanding' gravitated around the SG's need for the SMs to align with the stated strategic direction and the SMs initial lack of understanding and thus a state of ambiguity. These tensions, Aligning, and Ambiguity, are very different to the tensions of the earlier space, Direction, having and path to follow, but as Cunha and Putnam (2019, p. 98) suggest it's

important not to fall into the mindset of excluding other types of paradox that do not fit neatly into previous frameworks e.g., the Belonging, Learning, Organizing, Performing classification (Smith and Lewis, 2011), especially if those tensions "combine one or more of the four types of paradox in unique ways."

Aligning*:*

The use of the terms align-to/with, aligning, and alignment appear to be used commonly by all the conversational partners. The terms 'aligning and/or align-to/with' were present in all seven of the SG transcripts, in five of the one-to-one interviewed SM transcripts, and present in all primary texts analysed (Figure 5-15).
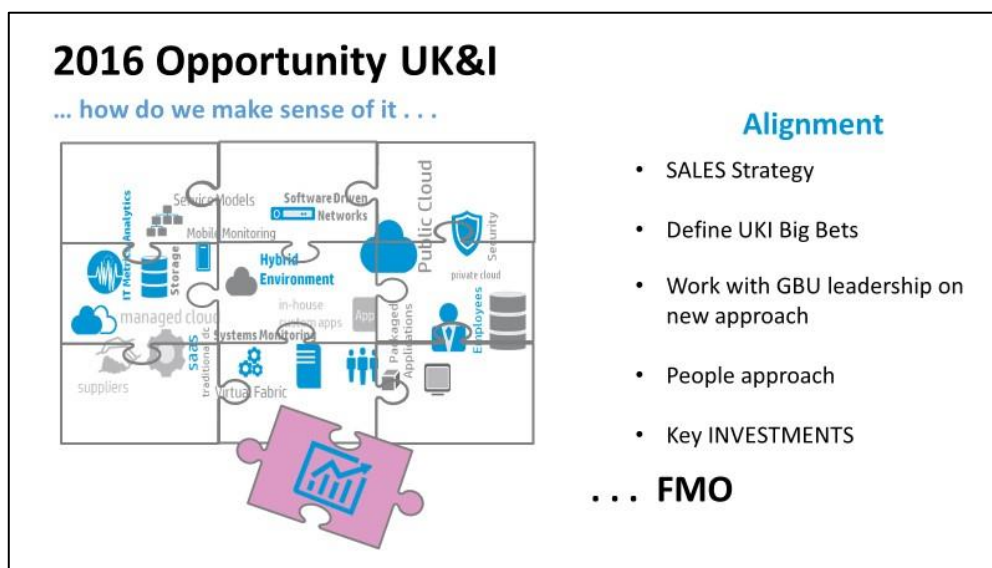
Figure 5-15: Alignment tension within texts

Source: p. 54, in EMEA Workload and Cloud Practice_FY16 Growth Summit PRESENTATIONS.pdf.

Interestingly, the term seems to be implying both the 'lining up' and the 'giving of support', i.e., lining up actions to deliver on the requested deliverables in support of achieving the strategic objectives conveyed by the leadership.

At first glance 'aligning' may not appear tensional, but was found to have multiple instantiations that imply tensions (Table 5-6), in summary:

- Aligning SG intent with SM interpretation (Top-down versus Bottom-up),
- Re-aligning priorities, actions, and practices to deliver on the conveyed future direction (New versus Old),

- The altering of attitudes and beliefs to align to a new way of thinking (New versus Old),
- Discussion of aligning resources against offering development projects (Power[16]),
- Focusing in on the priorities (Convergence versus Divergence), and,
- The under-current of whether to believe or not ('truthful alignment').

What then are the contradictory requirements of 'aligning' when the term is so laden? By implication sitting in opposition to aligning is 'not aligning' with CPs indicating that without reaching 'alignment', progress towards the strategy objectives will somehow not materialize.

Aligning is also often referred to with the term 'Interlock' (see sub-section 5.3.1.4), but both appear to have a different but inter-related meaning. 'Interlock' is a metaphor for joined up thinking across the organization, but always seen as following alignment, e.g.,

"Well, I often think about alignment as, as achieving a level of understanding and I think of interlock as reaching a point of agreement. … I don't think you can get to interlock until you've got alignment" [CP7-SG, Interview-1].

Both SGs and SMs talk of a need to 'align' being of great importance, and the terms aligning/align/alignment seem to have an almost mystical set of properties associated to their use. Aligning suggests that if only all the practitioners leant their whole-hearted support for the direction and objectives being conveyed, with the actions needed to deliver those, life would be so much easier and less demanding.

Aligning then, is the term the sensegivers use when articulating a need to line up their teams' actions in support of the stated corporate direction. The SGs position the direction in the context of the associated market trends as if to lend some validity to the communicated corporate direction and thus the teams' necessary actions, e.g.,

"aligning for me means that we, we've kinda aligned, and I don't want to, I shouldn't (use the word align to define its meaning). Basically we're, we're running in parallel together and we've agreed to a course of action" [CP6-SG, Interview-1].

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[16] "power is foundational to the functioning and manifestations of paradoxes in all organizations." Fairhurst, G. T., Smith, W. K., Banghart, S. G., Lewis, M. W., Putnam, L. L., Raisch, S. and Schad, J. (2016) 'Diverging and Converging: Integrative Insights on a Paradox Meta-perspective', *The Academy of Management annals,* 10(1), pp. 173-182.

Interestingly, 'aligning' has a tacit meaning that the SGs found hard to articulate, but looking at the interview data from the SMs, they obviously understood the use of the term aligning in the same way as the SGs.

"Aligning, means to me, that you understand what others are doing, and I'm talking specifically here about the offering space here as an example, what others are doing to make sure that you are aligning with them. So, for instance, a prime example around the offering space at the moment is the Service Management piece, so what are the Service Management Team doing so we need to align with them so we make sure that we can develop our offerings and, also sell the offerings, which is most important, the offerings based on the fact that we are aligned with our Service Delivery Teams and our Service Management Teams." [CP12-SM, Interview 1].

Additionally, the SMs seem far more focused on specific actions or process in their explanation of aligning/alignment e.g.,

"a fairly mechanical negotiating process whereby everybody had to reach an agreement that here's the budget we're gonna have for spend and here's the budget we're gonna have for investment and here's the budget we're gonna have for sales, er, and margin. And, er, we're all gonna be held accountable to these things and everybody's got a piece of this they don't like, and everybody wishes they had more resources, but it is what it is." [CP10-SM, Interview-1],

and

"So, aligning… I kind of use that term from, um, an offering-to-offering perspective. So, not, um, not from a people-to-people perspective, but more, you know, offering to offering and, um, whether it be the collateral or processes, and kind of the, uh, what we do within the company. I kind of take that as to aligning things together to make sure they're, uh, they're in sync." [CP9-SM, Interview-1].

Characterizing the process of achieving alignment, which is both a SG and SM responsibility, it is transient, iterative, potentially tentative at times and, exhibits tensions of trust and power (Table 5-6).

Effectively the point here is that the process of crossing the bridge into the second space helps address the tensions shown in Table 5-6 below.

Tensions of 'Aligning'	Facets of 'Aligning'	Evidence
Top-down, bottom-up: The tensions of aligning top-down SG intent with bottom-up SM interpretation	The sense of aligning needing to come from two opposite directions/points that need to somehow connect.	*"I think, by moving to this Practice formation we're going to better align that process because the, the top-down strategies will be built at the Workplace and Mobility level, not at some level you know two or somewhat layers above that, so that will give us a better opportunity to make sure that the projects that we're focused on erm, really truthfully align to the most imperative erm aspects of growing our business" [CP3-SG, Interview-1].*
Alignment and then not aligned: The tension of fleeting alignment due to changes in commitments	Alignment also appears to have a time component, that alignment is not something that's always sustained ad infinitum, there is a sense of point in time-ness that can raise tensions.	*"The point is, when time passes you find that we really didn't secure a firm commitment to go get this done, umm, we just had alignment at a point in time." [CP3, Interview-2],* *"there's tension in that commentary because it, it's flawed and it creates the, the problem is it creates a perception that there was alignment, when the reality is there really wasn't alignment or maybe there was alignment for just a brief moment but that alignment was quickly eroded when other groups went through the same process and other commitments were made that you know, overshadowed or trumped previous commitments." [CP3-SG, Interview-2].*
New versus old: (i) The tensions of re-aligning priorities, actions, and practices to deliver on the conveyed future direction.	That alignment can easily fall off its track (using same old processes) and takes effort to re-establish (to achieve different (positive) outcomes).	*"we've got to align" – It strikes me as almost a war cry, and "Alignment – different outcomes rather than same old processes" [FieldNote1-3rd Sept.].*

(ii) The altering of attitudes and beliefs to align to a new way of thinking	The 'winning of hearts and minds' one person at a time	*"I place a lot of emphasis on alignment in the first instance, I think there is again now probably a subconscious focused process I go through to achieve or to achieve alignment either for myself so that I feel aligned with what we're trying to do or to help others become aligned" [CP7-SG, Interview-1].*
Convergence and divergence: The tensions of focusing in on the priorities	Establishing the new priorities and attempting to focus practitioners' attention on achieving the new objectives	*"and where we're divergent from that corporate strategy and alignment understand why that is, rationalize it, make sense of it, make sure it is the right thing to do and then provide that feedback to whichever entity we're divergent from and explain why." [CP4-SG, Interview-1].*
Power: The tensions of who can or cannot commit resources	Discussion of aligning resources against offering development projects	*we test that against the different business units from hardware and software and others to not to force alignment but to make sure we, we are getting as much alignment from that corporate investment that we can possibly get" [CP4-SG, Interview-1].*
To believe or not believe: the tensions of belief	SGs wonder if they will be perceived as truthful when communicating a direction given the SM perceived past failings of the organization to follow through with the necessary resources (people, funding, time, tools etc.) to realise the strategy	*"Umm, it could be due to a belief system, and people are just locked into a particular belief system and umm, you know, they get to the destination via a different route, they might have greater belief in others rather than in data, some people have more faith in data. " [CP7-SM-Interview-1],* *"felt to be un-trust worthy" [Field Notes-1to3rd-September2015-EMEA GrowthSumit.docx].*

Table 5-6: The tensions and facets of 'Aligning'

Returning to the Literature: Defining 'Alignment'

Looking to the literature, 'Alignment' as defined by Khadem (2008) is related to everyone within an organization from the executive team through to every worker being focused on making the organizations strategy a reality. I.e., "This is the state of alignment we are talking about, where everyone understands the strategy, buys into it, knows how to make a real contribution, and strives to make a contribution to its realization." (Khadem, 2008, p. 29), while Merkus, Willems and Veenswijk (2019, p. 142), talk about "the actual process of implementation (of an organizations strategy) … 'Making a strategy work' is thus accomplished through practices that attempt to align – or perform – the organization with the aspired strategy.". Regardless alignment needs to be a continuous process and is demanding work to maintain it.

In relation to this study '**Aligning/Alignment'** is defined as: the understanding of an organization's strategy by those organizational actors (SGs) who are responsible for conveying said strategy and those actors (SMs) who are responsible for performing the actions such as obtaining the resources necessary to execute the strategy, activities, such as defining the offering implementation plans, and practices, e.g., presenting the budget requirements to leadership, necessary to realize the conveyed strategy.

Given the evidence discussed, I suggest that 'Aligning/Alignment' is a mix of:

- multiple tensions (Putnam, Fairhurst and Banghart, 2016),

- often nested (Berti, Simpson and Cunha, 2021),

- covering the yin and the yang of:

    o 'Top-down – Bottom-up',

    o 'Power (Commit or not commit)' (Berti, Simpson and Cunha, 2021),

    o 'To believe or not believe',

    o 'Aligning or Not-aligning',

    o 'Convergence and/or Divergence',

    o 'Cognition and Emotions' (Luscher and Lewis, 2008), and,

    o 'New versus Old' (ways of working),

and one that appears fundamentally inherent within the conveyance of portfolio strategy.

Ambiguity:

This state of ambiguity is a natural bed fellow with the lack of, and the seeking of, clarity by the SMs. Ambiguity comes before alignment, i.e., if you have ambiguity you can't get to alignment, so the process of these two spaces is helping facilitate the clarity to move forward, once alignment is achieved.

We already know that "Strategic communication oscillates between clarity and ambiguity in order to defuse the dilemma and paradox" when conveying strategic goals, but strategic clarity and ambiguity continue to be an under researched topic (Hoffjann, 2022).

SGs appear accepting of ambiguity, and of its tensional nature, but recognise that SMs will actively seek further clarity to aid their understanding. Interestingly SGs talk of ambiguity in colourful/rich (Weick, 2007) metaphorical terms e.g.,

"*organizational ambiguity …Talk about adding friction. Right, it's like gluing sandpaper onto the pistons*" [CP2-SG, Interview-3], (Memo 7).

Memo 7: Ambiguity and Clarity

Extract from GTM Memo: Ambiguity and Clarity

Tensional in nature. A lack of clarity begets a state of ambiguity.

There's a whole theme of wanting and/or lacking clarity which implies a state of ambiguity on the part of the sensemakers when hearing the strategic narratives for example:

"*give us more clarity on the comparison between clusters and the other regions' ... 'is this typical?' ... 'how were the numbers captured, from what sources and what do they really represent?'*" [Document: FieldNotes 1-3Sept],

while sensegivers recognize the organizational norm of a good deal of ambiguity

"*I think we have far too many instances of ambiguity and dupli- perceived duplication in organisational bodies.*" [CP2-SG, Interview-3] *which causes tensions,*

"*And I think that organisational ambiguity and, and potential duplicit-… no, duplicitous is not right, dupli-, duplicity, right, just, it just… Talk about adding friction. Right, it's like gluing sandpaper onto the pistons, for crying out loud.*" [CP2-SG, Interview-3].

The lack of clarity (and resulting state of ambiguity) raises concerns in the minds of both SGs and SMs,

"*But the lack of facetime with each other, and the lack of clarity about who's doing what, you know – and that took for fricking ever and a day, right – all I think are headwinds*

> *against being able to do that. And only those that are super-disciplined and super-diligent and super-organised, I think, will succeed." [CP2-SG, Interview-3],*
>
> *with the suggestion that the lack of clarity will hinder only those not strong enough to work their way through the swirling fog of ambiguity!*

Maybe the SGs' comfort with a certain amount of ambiguity is based on either their level of experience and/or they have a big picture view while expecting the SMs to work out the detailed actions. The SMs however, are looking for specific instructions and help with priorities from the SGs, and/or potentially the SMs haven't spent enough time thinking through the implications ('space to think'). Maybe once a practitioner appreciates the plurality of views, implications and the conflict and negotiation necessary, reframing takes place for action to begin akin to the Performing paradox, (Smith and Lewis, 2011).

Another facet of 'ambiguity' to consider is that 'ambiguity and clarity' are in tension for a time, and/or until enough of the implications have either been accepted or worked through to allow clarity for action. Potentially ambiguity is a temporary tension that is tolerated by the practitioners until such time as clarity becomes clear, though for some I suspect a level of ambiguity may continue which results in becoming 'stuck' (see 'Stuckness', sub-section 5.3.1.6).

As Weick, Sutcliffe and Obstfeld (2005, p. 419) state, "To deal with ambiguity, interdependent people search for meaning, settle for plausibility, and move on.", and by implication, a sensemaking process given that plausibility is a key element of sensemaking (Weick, 2002).

Focused Code: Locating context

Context helps to define identity and instils a message of belonging during times of strategy conveyance. The SGs think its context:

"Well, umm, I'm kinda big on context so you're hitting on something that I think is very important with me, umm, I have to understand where I fit within the overall blueprint, right, it's not that someone's got to go, I, umm, tell me every last little detail, I'm a fairly bright guy, but I at least need to understand where I sit in the scheme of things." [CP2-SG, Interview-1],

"Yeah, yes, it's really giving then a 'here's the strategy and here's why you fit into the strategy in your role' conversation" [CP6-SG, Interview-1],

"so I think it's important that you do when you're talking strategy and what not, you have to put some stuff together that acts as context and that people can come back to right because that stuff we're working on can change a lot, err, priorities can change and you need to have something that can be kind of enduring I think to help keep people grounded" [CP3-SG, Interview-1],

whereas the SMs see it as 'fitting in'. Effectively for the SMs, context begets a sense of identity and belonging i.e., a need to belong and perform in their roles, which is reminiscent of the Belonging:Performing tension of Smith and Lewis (2011), it's how SMs appear to locate themselves within the strategic narrative. Context then is the anchor that allows SMs to explore and ultimately understand other versions of reality and potential future options while still being tethered to something safe and solid.

Context supports the strategic narrative in the view of the SGs, its paints a picture of the future for sensemakers and by doing so flags to sensemakers they need to understand implications and why the strategic narrative is important to them as noted in observation field notes ("The whole flow of this presentation was aimed at setting the scene along the lines of time for change, conveying the need to change." [FieldNote-1 3rd Sept.]),

"Umm, they also really told me that they like that slide (Pol/PoR) because it does give them a vision of the future umm, but it also helps them see what other teams are working on so that they have a context for when they get asked questions, there's at least some common ground about what they're trying to do and when their deliverable is." [CP6-SG, Interview-1],

"So I tend to receive content in multiple sources and then what I tend to do is umm, typically what I call the five S's umm, the 1st S is you know I really try to study the information, and what I mean by study is, I try to understand the context behind whatever is being proposed, is it to fix an existing problem, is it to realize new potential, is it a reaction to something that's just happened, so, I go through a process in my own mind, a bit subconsciously of studying the surrounding, the surrounding information or the context around whatever is being communicated" [CP7-SG, Interview-1].

Sensegivers recognize that context is important in the strategy conveyance process,

"I think no matter where you are, you have to set some context, right, um, so that people understand why they should care about it." [CP2-SG, Interview-3],

and that context matters to sensemakers from different backdrops or starting points,

"but I think it's the context of what makes them important to the audience that you're taking them to. Right. So, the context on those roadmaps for Virtual Clarity will be radically different than, say, the context when you go to the Apps practice" [CP2-SG, Interview-3].

The code: Locating context is both about context sharing in the minds of the SGs to prepare the SMs, but it generates tensions for those SMs in terms of fitting in reminiscent of the Belonging:Performing tension (Smith and Lewis, 2011). In a sense there's the big picture strategic context and the praxis context that must be reconciled. In sensegiving-sensemaking process terms, the SGs are offering cues, the SMs are making sense of their identity. The process is ongoing, and iterative, until there is a plausible argument around which people can organize and then take action (Weick, 2002).

Focused Code: Talking with others

Talking with others, whether SGs talking with each other or to their teams (SMs) or SMs talking between each other is a foundational process in their minds about how things (strategies) become understood, fleshed out, the narrative refined, implications uncovered, decisions made, aligned to and then the necessary actions enacted. E.g.,

Checking understanding: *"I can't remember exactly when, but I know, um, on multiple occasions, um, I'll, er, I'll reach out to (Leader's name). I think we kind of look at things the same way a lot, and if there is something, if there's something sort of implied by some corporate jargon that's in something, um, I'll reach out to him and say, like, "Okay, are you reading this the same way I am?" You know, "They don't come out and say that, you know, that, er, this change is coming, but they're kind of hinting at it, aren't they?"" [CP10-SM, Interview-1].*

Ultimately, talking is a clarifying process to reduce ambiguity, gain alignment and thus a sense of belonging.

Fleshed out: *"I've talked about it with my team, we're just not far enough along yet and I don't know if they completely understand it yet either but, I, I think as we put stuff together and we talk about executive conversations that hit on thematic based ideas that you know tie back to the New Style of IT [the strategy]" [CP2-SG, Interview-1].*

Narrative refined: *"And by talking to the teams… I didn't worry about building it all out at first. I let (peer's name removed), you know, we got the materials and (peer's name removed) and I did, (peer's name removed) and I did a couple and then that led me to, "Okay, now I'm starting to see where the talk track goes." [CP2-SG, Interview-3].*

<u>Implications uncovered</u>: *"we talk through those umm talk about you know what does that mean for storage" [CP1-SG, Interview-1].*

<u>Decisions made</u>: *"And there were a number of meetings and, and presentations that we went through to talk through erm, what those projects were, how well they mapped back to those, those principles and, and in this case, this was one that err, that did make the cut, so it was above-the-line [strategy to be funded and implemented]." [CP3-SG, Interview-1].*

<u>Aligning to strategy through talk</u>: *"yes, we [SGs] use the SteerCos a lot in that, so the deck that we review in those with (SVP) and others is something I bring to my staff meeting and we talk, talk through and talk about what is aligning to our strategy, how are we realizing that, and what are the results we're getting from it." [CP4-SG, Interview-3].*

Talking with others extends further in the SM's minds also, when strategies are conveyed from the CxO team directly, there's a feeling that prior talk has occurred to refine the strategic messaging, to make it consumable somehow and resonate in the minds of the consumers [the SMs], e.g.,

"what (EVP-1 name) says, what (EVP-2 name) says makes sense to me, I can see where they're connected, they've talked, they've thought this through, they've discussed this" [CP4-SG, Interview-1].

Talking with others feels important as a code, it appears to be the way meaning making happens in the minds of the SG/SM conversation partners. Ultimately talking with others is inherent in the conveyance process, it's how understanding is reached and how what needs to happen next, how the actions necessary are decided:

"I would think it through, and then I would draw on, if, it was err, something I believed was a technical impact, erm, I would call on my technical people, I don't actually have them as part of the team, but I do have people working with me on the offering. Erm, and also SME's, and Advisors, we have a person from the Advisory team, I'd work with the Advisory team, Subject Matter Experts and work through what that impact might be and what we need to do to respond to it." [CP12-SM, Interview-1].

Sub-category 2: Belonging, locating context through talking with others, is fundamentally a space to enable the initial green shoots of understanding to sprout, to allow SMs to mentally ready themselves that they may have to ultimately act if the strategy affects their portfolio of offerings.

5.3.1.3 Sub-Category 3: Making connections, thinking through implications

This space is one where both the SGs (talking as SMs) and SMs talk about making connections, look for patterns to connect the content of the message conveyed to something known, as an anchor to then explore from. It's a space full of both individual reflection with some reflexivity, and a space for organizational learning (Vince, 2002) e.g.,

"I guess I'm still trying to get my hands around how we go from what we've been doing – which really is a series of predefined release dates and, you know, march towards a release date" [CP1-SG, Interview-3],

and

"Yeah, I mean, the, the times when I, when I have these breakthroughs seem to be… seem to be like when I'm doing something mundane, like, like ru-, like running or driving or walking the dog or, um, you know, that, that, or waiting in line somewhere. It's those types of things when I have nothing else to do, er, that, uh, that I'll just kind of replay, um, what I've seen and talked about and been doing during the day. And, and, you know, sometimes I'll notice something about, um, strategy or have a realisation that connects two things. I'm always trying to do pattern recognition in my head. I'll, I'll connect something in a strategy message to something in our annual report or something." [CP10-SM, Interview-1].

One collective space that both the SGs and SMs, as individuals inhabit, with two associated tensions and one focused code emerged: 'Making connections, thinking' (Figure 5-16) from the following codes:

- SGs: Space to think through implications,

- SMs: Space to think through implications,

- Tensions:

    o Market changed, go faster,

    o Need clarity,

- Focused Code: Making connections, thinking.

Each of these codes are now discussed in turn.
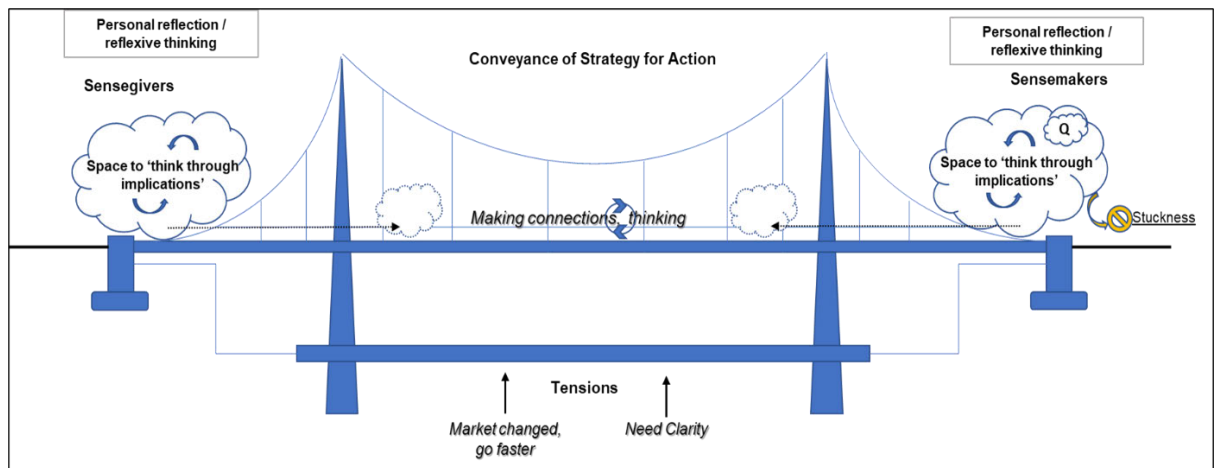
Figure 5-16: Sub-category 3: Making connections, thinking through implications

SGs and SMs: Space to think through implications

A sensemaking space where those attempt to internalise their thinking prior to taking any action. This space appears to be enabled by each sensemaker, either as an SG being themselves an SM at times, or the SMs in their own way, whether that's creating time to think when in the shower, walking the dog, going to the gym, or sitting quietly and reflecting. This sensegiver skill, that of switching back and forth between being a sensegiver and sensemaker, is surely of importance for the enactment of strategy (Weiser, Jarzabkowski and Laamanen, 2020). Likewise, creating time to think (Kline, 1999) seems important for the effective doing of strategy.

Space to think through implications is the act of making connections, internally evaluating, and inspecting what has been conveyed to those sensemakers.

"there's two ways that I create space for myself, the first is that I get up at four o'clock in the morning (Researcher: wow), yeah, but it's my quiet-time where the first thing that I need to do is actually get all of the crap out of my head umm, so I take some time to meditate, or pray or walk, I kinda clear the space first, and then I design my day with the strategy in mind, umm, so I will spend a good 30 minutes every morning before the, probably all the crazy stuff hits, before you get anything, I'll look at my diary for the day and say, you know, is this fulfilling on the mission, is there things that I can push off that are not strategically important, umm, you know, what's the value that the day is going to generate and how do I make today living into the strategy and be more successful." [CP6-SG, Interview-1].

Space to think through implications then is a space to playback what's been conveyed, to allow the brain to process while active on another task; a space that leads to insights for many:

"I, I haven't been running much lately, but I used to, um, I used to replay things that I thought were important on my runs (Researcher: mmm) in my head. And I would completely lose track of time and where I was and stuff, and I would, through the repetition in my head, I would have insights that I would immediately have to get back and write down, um, or I was gonna, gonna forget them." [CP10-SM, Interview-1].

This space is also where SMs seek internal clarity, where they decide on how the conveyed direction impacts them, their role, and what actions may be necessary. Self-questioning is inherent within this space and both reflective and reflexive thinking occur here. The reflective component is related to what the SMs have heard and seen, while the reflexive component is more axiological with the SMs playing 'what ifs' and considering the value of possible futures.

"I would look at the offering I'm developing, the [ABC] offering and think through what impacts it would have to the offering and then depending on the results of that what I need to do to the offering itself or whether there is a, you know, there is such an impact that it will actually cause a problem and then feed that back and work with my manager" [CP12-SM, Interview-1].

In summary this space, more than any other in the process flow is the space where SM's make connections with what has been conveyed, they think through implications, but also an SM could become rooted to the spot and fail to move on.

*"[SG] I **anticipate** that they will get stuck at different spots, different individuals will get stuck in different areas ", [CP7-SG, Interview-1].*

If the result of the SMs reflection is a need for increased or further clarity, then there's a possibility the SM could even loop backwards to the previous space (Space for questions) and seek to ask further questions of others or even the conveying SG. If not there's potential to become forever stuck (Stuckness, discussed in sub-section 5.3.1.6) and fail to decide on any course of action.

Tension: Market changed, go faster

This tension 'Market changed, go faster' is particularly noticeable within the texts:

"THE MARKET AND COMPETITION IS CHANGING" [TEXT: EMEA Workload and Cloud FY16_Growth Summit],

"Hybrid becomes the norm" [TEXT: Updated-CPS-CIO-vFINALv8-3],

and

"Market analysis: Digital needs are shifting buying factors" [TEXT: 01-FINAL-Appendix 2b FY19 SBP CPI-Presentation].

The context of the IT Services marketplace, one of constant evolution and competition, sets a macro impetus of pervasive urgency, and by implication by not moving quickly enough to at least stay at par with the competition there's a sense the organization will fail. This is really an either/or macro-dilemma and could be said to be an adaptive tension (Boisot and McKelvey, 2010; Boisot and McKelvey, 2011), in the nature of 'success or failure', with the pressure being external and necessitating an internal change.

Boisot and McKelvey (2010, pp. 416, emphasis in original) suggest that "the conjunction of *adaptive tension* – [is] the gap between the variety internally available to a system and that which confronts it externally".

Market changed, go faster appears ever present as one of the conveyed reasons for action within the texts supporting the conveyance of strategy. This sense of urgency is then reenforced within the conveyed narratives, e.g.,

"I think the state is accurate in that this type of change is the new normal 'cause it exists and its happening company and industrywide. I don't feel like [MergeCo] is any more different than the (Vendor-1's) and the (Vendor-2's) of the world, and the system integrators, umm, everybody is having to be in this level of a change and complexity." [CP6-SG, Interview-1].

This tension then is very 'real' and pervasive throughout the industry, within MergeCo, and reenforced within numerous texts and the supporting narratives as a challenge to rise to and not to fall behind, to stay competitive and therefore relevant within the marketplace.

Tension: Need clarity

This tension, needing clarity, the other side of the coin from 'ambiguity', implies firstly the SG's concern that they lessen ambiguity, via **coaching**, so their SMs can understand and act, but also, it's the tension between holding the bigger picture in mind whilst also recognizing the detail needed to execute.

"it's incredibly important for the organization that, that the senior leadership communicate in very clear and unambiguous way, and, and erm, I, I, I need to count myself in that, I think any leadership in the organization needs to communicate in that way and even if you don't have the answers you still have to be clear in your communication." [CP3-SG, Interview-1],

and,

*"I **coach** them all that they need to have their own time and space to think about and plan. I use the staff meetings a lot to allow them to ask questions, to get clarity (CP: Uh uhn), umm, make sure there's understanding, so when people say hey, we went to the All-Leader with (SVP) today and he said something about AWS and Azure, and I interpreted X that as, and is that really what he meant? Or did I just hear the words wrong? Umm, and then through the one offs its more individual help on areas I think they need because some of them are very good technically, some of them are very good from a business perspective and they need a bit of **coaching** one way or the other, usually because their day to day jobs get so bogged down with the minutia of fighting with an engineer over is it widget a or widget b they start to loose perspective." [CP4-SG, Interview-3],*

while the tension for the SM's is a feeling of ambiguity, thus a need for further clarity of context, purpose, a need to think through the implications and then comprehend the actions they should take to move forward.

"I think that, um, the formal team meetings do provide the information, but I think you need to discuss it with others [to gain clarity]. Because, again, to the point I made earlier, when you read a presentation, you can interpret it the way that you think that you would interpret it because of the way that your social conditioning, etc… And again, when you're on staff calls, if you… You listen to the information, and if there are topics that you think "Did I understand that correctly? What do I think about that?" you might talk to your peers around, about it, or to your manager, and say, "Well, actually, I didn't understand it," or, "This is my interpretation. Does it really mean this?"" [CP12-SM, Interview-1].

Clarity seems to go hand in hand with ambiguity for the SMs. Clarity of understanding through lessening the ambiguity and gaining a deeper understanding to think through the necessary actions conveyed in the strategy. Clarity though appears to be an emergent property of talking things through and making connections when faced with ambiguity, and the link between clarity and ambiguity stretches across at least two conveyance spaces.

Making connections, thinking

Making connections and thinking through implications (both reflective and reflexive) and is made up of a collection of associated initial codes, one's that coalesce around connecting with others, connecting with the conveyed strategy, hitting the 'spot' on message, understanding and actions, and taking time to think about what's been conveyed, why the

changes are important, what the implications of the changes are, and finally what actions might be necessary to enact the strategy.

This is a complex focused code as the extract of the Memo 8 below illustrates. The narratives of both the SGs and SMs implies both are still attempting to make sense, and the SGs are still trying to work out the direction, even as they are conveying the strategy. Additionally due to the ongoing evolving nature of the macro-organization the portfolio organization sits within, there's also a flavour of the changing organizational identity (what's NewCo going to be known for, how do the resources of the two merging organizations that form NewCo successfully integrate? Will I still have an offering to manage?).

Memo 8: Making connections

> *Both SGs (talking as SMs) and SMs talk about making connections, looking for patterns to connect the content of the message conveyed to something known (as an anchor to then explore from).*
>
> *"your ability to take that input and process it and say that's, that's exactly right and I'm integrating it in this way"* [CP-3, Interview-1] and,
>
> *"Yeah, I mean, the, the times when I, when I have these breakthroughs seem to be… seem to be like when I'm doing something mundane, like, like ru-, like running or driving or walking the dog or, um, you know, that, that, or waiting in line somewhere. It's those types of things when I have nothing else to do, er, that, uh, that I'll just kind of replay, um, what I've seen and talked about and been doing during the day. And, and, you know, sometimes I'll notice something about, um, strategy or have a realization that connects two things. I'm always trying to do pattern recognition in my head. I'll, I'll connect something in a strategy message to something in our annual report or something."* [CP-10, Interview-1].
>
> *Both the SG's and SM's do a good deal of reflecting about the conveyed direction, how it fits into what already exists, how the direction integrates with the market ('where we play') and how the whole team involved interpret and understand the evolution of the offerings over time and why investments are focused in certain areas ('where we place out bets').*
>
> *" I've tried to understand where we think from a CPI perspective, where (SVP) and the leadership team thinks the market is trending and going and how NewCo adds value to that, 'cause, 'cause I think, I think that's important in understanding and helping people, and everyone else understand where we fit, where we play, or are we in a natural, or are we just on a cycle of obsolescence of our, of our own services. Umm, so that's kind of where I've been focusing, and as CPI matures and then trying to understand are we, are we focused enough and where we place our bets or have we once again spread ourselves too thin across to many areas that weren't affective at all of them."* [CP-3, Interview-3].
>
> *Deep reflection occurring in the minds of both SGs and SMs on connecting the here and now to the future state, and considering how things fit together:*

> *"I guess I'm still trying to get my hands around how we go from what we've been doing – which really is a series of predefined release dates and, you know, march towards a release date"* [CP-1, Interview-3],
>
> *"So, the announcement's just the announcement, but then there's more behind it, right that the reader has to go find out. Who, who are the points of contact? How does that announcement relate to the job that I need to do? Right? I mean, I'm sure there's, um, there's the… like announcements or strategy calls have relationship to multi-points, but, you know, for, for my purposes with migration, like with VMware, there's just a migration component of VMware, so I need to do the deep dive into that specific component. Even though the announcement or the strategy round-up may not have said that, you have to, the reader has to interpret that, but… and kind of connect the dots. Right? And, and then do that next-level analysis."* [CP-9, Interview-1].
>
> *This 'space' seems to be full of reflective thinking, and to some extent reflexive thinking. Much of this 'thinking through' seems to be individual, but I wonder if the practitioners talk to others after reflecting? Am I missing something in this space I wonder?*

This space is heavy on reflective thinking and is discussed further in chapter 6, section 6.4.

5.3.1.4 Sub-Category 4: Understanding (made), and validating

This space in an SG's mind is where SMs should exercise the validation of their proposed actions in response to the conveyed strategy, while, in the minds of the SMs, it's the space within which they confirm the actions they intend to take in response to the conveyed strategy. This space then is where SM's replay their understanding to the SGs, confirm the understanding they have made and validate their proposed actions readying to execute. This is also a space rich in tensions that the SMs must navigate, and one where the SGs often need to clear the pathway for the SMs to ultimately proceed 'across the bridge'.

Two distinct spaces with three associated tensions and two focused codes, 'Understanding (made)' and 'Validating' (Figure 5-17) emerged and were coded as follows:

- SGs: Space to validate actions,

- SMs: Space to confirm actions,

- Tensions:

  - Risk versus speed,

  - Interlock actions with others,

  - Control: Authority versus Responsibility,

- Focused Code: Understanding (made),

- Focused Code: Validating.

Each of these codes are now discussed in turn.
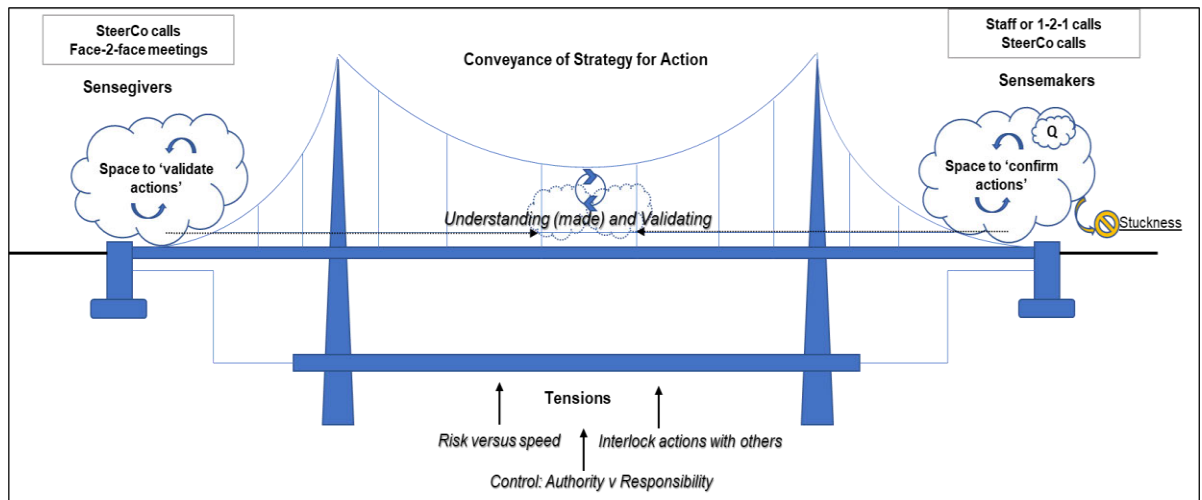
Figure 5-17: Sub-Category 4: Understanding (made), validating, and organizing for actions

SGs: Space to validate actions

This space is where SGs seem to expect SMs to sense-check their actions necessary to execute against the strategy, but also a space that SGs convey that they have a certain responsibility to guide their SMs forward, to help them understand and act. The space is often enabled by the SGs through a meeting mechanism know as SteerCos (Steering committees) or in one-to-one conversations to add richness of meaning through increased narratives and even empathy.

The SGs expect that by enabling multiple interaction opportunities for the SMs via e.g., SteerCos, Staff calls and 1-2-1 calls, they will have facilitated dialogue, presentation of plans for execution and aided the SMs to complete their necessary cycle of 'learning' (understanding) and validation.

"we use the SteerCos a lot in that, so the deck that we review in those with Eugene and others is something I bring to my staff meeting and we talk, talk through and talk about what is aligning to our strategy, how are we realizing that, and what are the results we're getting from it." [SG-4, Interview-3].

SMs: Space to confirm actions

Space to confirm actions feels predominantly like a sensemaker space, where the SMs test their assumptions and validate their planned next set of actions with the sensegivers. It's about knowing, now having the knowledge, and having achieved a level of understanding that allows forward progress, to define the next step actions that need to be executed for the strategy to be put into action. SGs do refer to the 'space' but more from a facilitation of actions and a knocking down of blockers perspective.

Ultimately, it's an ORGANIZING space where the SGs validate the SMs proposed next steps, and the SMs test their understanding through articulating their planned actions. Effectively the SMs are setting in context the actions they need to perform:

"I would write down what, what I need to do, and probably set up a meeting, and even set up a meeting with others to discuss it with others to start with, as a start point, and then see what comes up, and take it forward if need be and if not then at that point we don't need to do anything at this point..." [CP12-SM, Interview-1],

and

"in general, that stuff, I mean, it transmogrifies, but it winds up a being… what, what ends up being other things, like What we Sell (Researcher: mmhmm) and, and the, the market-facing and internal-facing material. Certainly, the internal-facing material usually has a pretty direct line between, you know, that in initial kind of strategic thinking, um, and, and scope-setting, um… through to, you know, how do you then educate, um, the organisation that's supposed to sell, solution and deliver it." [CP8-SM, Interview-1].

On reflection this space seems quite fluid, and I did wonder if I'd defined this one well enough. Its very emergent in nature and the boundaries seem to flex a good deal from CP to CP and SG to SM. I also noted a good deal of tensional language in this space probably because of the interview questions around alignment and interlock. This however is the space for SMs to talk about actions, next steps and moving forward i.e., organizing for action, with the SGs. Referring back to the paradox literature this is the tension of the organizing paradox, which "surface as complex systems create competing designs and processes to achieve a desired outcome", (Smith and Lewis, 2011, p. 383).

Tension: Risk versus speed

This tension appeared late on in the data gathering at the point of validating the emerged tensions,

"The one thing in the tensions that I didn't see represented – and it could be inherently built into all of them – is the concept of risk. How much… you know, if I can… and my example's always from a client perspective. If I can save 40%, I'm willing to take much more risk around speed, costs, people skills than if you're gonna tell me I'm gonna save 5%. Then, my risk tolerance is gonna be way, way lower. There's not enough at the end of that rainbow. And again, it could be… it could come out of each and every one of these or some combination of these that it manifests itself." [CP4-SG, Follow-up-Interview],

and although couched in terms of an external perspective (the client) when discussed with other conversation partners they agreed that the level of risk versus the speed necessary to get to market with offerings that supported the corporate strategy was an underlying tension always present, e.g.,

"And actually, there was a Steer Co call that sort of will go down in… in our practice history, (Researcher: right) where I lost it, I totally lost it. I… we had a really significant red issue that needed leadership, um, action on. (Researcher: yeah) It was a clear escalation. You know, I'd written the slide specifically around the… the ask, and I had generated a call to action from a sense-maker to the sense-givers, (Researcher: yep) right, and they didn't pick up on it. (Researcher: mmhmm) Right? And we were just about to move on… and I said, "Stop. Stop." And [Name] and [Name] were on the call, and I said, "Look," I said, "We're crying out for help here. The slide says that we, as a practice, are not able to move forward [Risk]. These are really significant issues. They are going to impact our ability to deliver [Risk], (Researcher: mmm) our ability to… to... to make revenue [at the speed the organization needs to achieve its targets], all of those things, right, unless these things get addressed." [CP8-SM, Follow-up interview].

Tension: Interlock actions with others

This tension is joined at the hip with the code/tension aligning (see sub-section 5.3.1.2).

CPs define Interlock differently from alignment (aligning) so they obviously think of the terms as having different but interrelated meanings, and even they talk as though align and interlock should always occur together:

"I think they (alignment and interlock) should always go together. I don't think that they necessarily always do, but I do think that to have the execution of the strategy to work you need both" [CP6-SG, Interview-1],

So, are alignment and interlock paradoxical in nature? They are obviously related, but they don't occur simultaneously, rather interlock comes after aligning/alignment (sub-section 5.3.1.2) and are linked through time, e.g.,

"I do see conceptually the alignment being more a political, organizational structure versus the interlock being a, an agreement that naturally flows from that." [CP11-SM, Interview-1].

By implication, if the process of aligning does not occur, then it follows that interlock fails to happen. If this is the case, then it suggests that action also fails to happen or that the actions that do occur are not in 'lockstep' with the conveyed strategic direction.

Tension: Control - Authority versus Responsibility

This tension was late to the party and emerged in individual follow-up conversations (with both SGs and SMs) and a SM forum discussion when reviewing and validating the study framework and findings. There was a general SG feeling that often the conveyance of a strategy (or associated tasks) came with no real clarity of decision-making follow through (responsibility versus authority) with end-to-end connections being lost, while the SMs often pondered the connections of responsibility with no authority (to marshal the resources necessary to complete the actions requested), thus tensional in nature, e.g.,

"So… And I think people get… you know, they get assigned to stuff that they don't have… the leaders that assigned them are not giving them or not believing them the authority to go do their job. We see that with (SVP) in Johannesburg assigned people: "Okay, (SVP) said he wants somebody – fine. (Leader) can go handle it," and (Leader) pushes it down and assigns somebody deep in the organisation, and when it's time to make a decision, time to go roll things out, "Oh, we're not doing that. We're doing Project XYZ." [CP4-SG, Follow up-Interview],

"well the one tension I think you need to add is that of responsibility versus authority, 'cause there's a lot of things our leaders ask us to do but it often feels like we have all the responsibility but none of the authority to get clarity on where the resources are coming from to make it happen!" [CP-ForumSMs, Forum-Interview-1].

The implication of this tension, authority versus responsibility, if not resolved, is that the doing of strategy could likely be derailed and not progress as the SGs expect.

Understanding (made)

Understanding is a complex code full of knowing, knowledge, information, attempting to interpret, trying to understand and at times, not knowing and misunderstanding … but

ultimately within this study it's both the practical and cognitive processes the practitioners engage with that result in them knowing what is expected of them and what to do next, and why, i.e., understanding made.

Understanding then is a focused code made up of a collection of initial codes that cover a myriad of terms, feelings, and interactions, e.g., opportunity to understand, trying to know, knowing, making sense, understanding connections etc. Ultimately, it's about the sensegiving-sensemaking processes of, and between, the SGs and SMs, and the resultant interpretation and internalization by the SMs. There appears to be a natural pairing to these codes (effectively SG to SM) evident in the data with the SMs reflecting-back their understanding made (to the SGs) through the validation of their proposed next steps/actions (Validating).

Conveying knowledge / Receiving knowledge:

"help them understand what it is we see the industry doing from an IT perspective" [CP4-SG, Interview-1],

and,

"once you've got it in your head as a, as an offering leader, absolutely everything that comes after that is, is actually trying to, trying to crash that message in a way that each audience that you are, um, uh, bringing up to speed, they can, they can understand that message, take it onboard, and then take that out into their respective organisations, whether they're selling it, solutioning it or delivering it." [CP8-SM, Interview-1].

Imparting meaning / Trying to know / Attaining meaning:

"you know it's something you need to really sort of work on is to err make sure they're not only just hearing the message but starting to internalize it and really start to think about it." [CP1-SG, Interview-1],

and,

"immediate response is to try to… try to absorb them and figure out if this represents a change or a restatement of, you know, previous strategy" [CP10-SM, Interview-1].

Understanding as knowing:

"So, that kind of thing, right. Um, so obviously, that takes additional time, so you obviously took the time to go learn it and to figure it out and understand it, and then it, then it, you know, takes the time to go help other people understand it, I guess. So, yeah. But it has to happen, right? I mean, everyone's got to know. " [CP9-SM, Interview-1].

Making sense:

"your ability to take that input and process it and say that's, that's exactly right and I'm integrating it in this way" [CP3-SG, Interview-1],

and,

"It's what does it mean for the offering I'm developing and what impact will it have on that offering. And, whether it makes sense with the offering I have, and not only the actual impact, its whether actually it still makes sense with the end to end strategy and what we're doing." [CP12-SM, Interview-1].

Not understanding / Not knowing / Lost meaning:

"the message that you're giving them from one silo doesn't bear any relationship to the job that they're doing for that client on a daily basis so they can't understand what they need to do" [CP5-SG, Interview-1],

and,

"they lose that strategic translation" [CP4-SG, Interview-1].

Validating

So 'validating' isn't related to asking for permission to act, nor is it one of checking specific actions or tasks. The sense of this code is more of both SGs and SMs reflecting. The SGs reflect on whether they have imparted knowledge that can be understood, leading by example if deemed appropriate, and then, consider what more they can give to help their SMs move forward across the bridge, e.g.,

"if I've done a decent job of you know, painting the picture and articulating where we need to get to and why, a few them will get it, or at least a few of them will get it ahead of anyone else so metaphorically I would then turn to them to hold the hand of those who are hesitant and help them walk across the bridge, or I would go over to the other side of the bridge and hold their hand and personally show them that I'm personally prepared to put myself in exactly the same position I'm asking them to put themselves in, just hold their hand and walk with them." [CP7-SG, Interview-1],

and for the SMs more related to have they internalized what's next and begum to plan for action, e.g.,

"the last staff call we had with (Leader), I met with (practitioner) and (practitioner) just the day prior around migration and the USPS space, and um, so I tied the conversation we had prior

to what he presented on our staff call, um, and then obviously the next steps that are related to what support he and his team need, related to migration, coming out of what he presented on the staff call, right. What, now, now what do we need to do, right? And you know, kind of, you present it, but then it just, you just don't leave it there, right. The, you know, you go and do something with it and now we have follow-up calls and, you know, he's tying this into (Vendor), which is a partner that they're looking at that's related to migration. So, um, you know, kind of taking the next steps from there " [CP9-SM, Interview-1].

The understanding made / validating process is one then of, using another metaphor, connecting the dots.

With the presentation of the evidence pertaining to **Sub-Category 4: Understanding (made) and validating** complete, I next present the final subcategory, **Sub-Category 5: Acting**.

5.3.1.5 Sub-Category 5: Acting

As with all endeavours, there became a point where I found it necessary to bound this study due to a dwindling of resources (time, money, access to the same conversational partners), and as a result, this space is only inferred from scant data. This space then is considered out of scope of this study as an area of limitation, but also one that should be researched further if opportunity arises.

This space is one believed to be predominantly inhabited and lived by the Offering Managers (SMs) performing the necessary actions that bring the conveyed portfolio strategies to life.

Limited analysis suggests it's a distinct potential subcategory with at least one space and associated tension (Figure 5-18) which were coded as follows before this subcategory was considered out of scope for further data gathering and analysis:

- SMs: Space to act,

- Tensions:

    o Move from to.

Each of these codes are now discussed in turn.
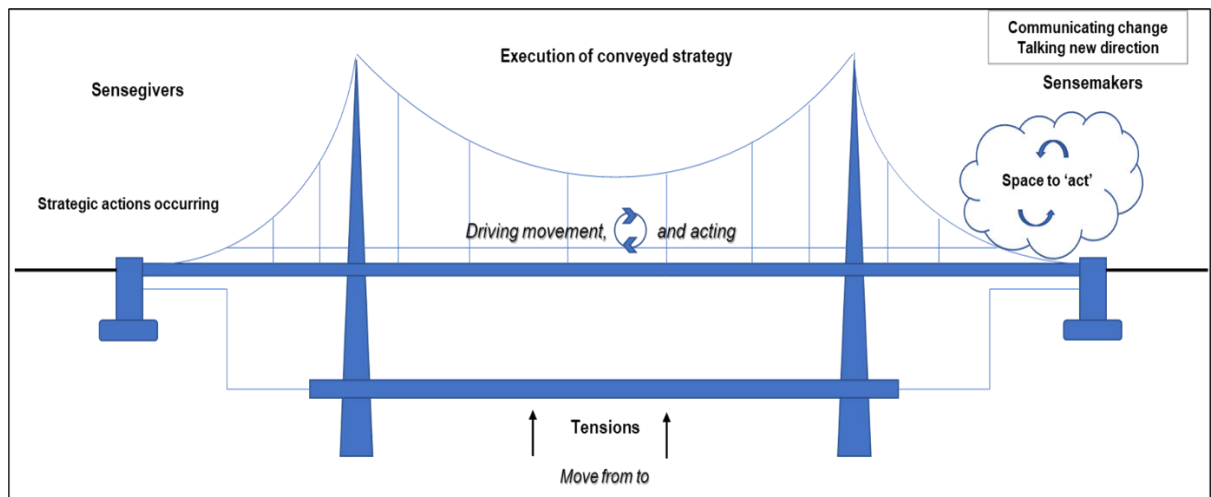
Figure 5-18: Sub-category 5: Acting

SMs: Space to act

Initial insights suggest this space is potentially composed of actions by SMs to implement the conveyed strategies, e.g.,

"I would, I would write down what, what I need to do, and probably set up a meeting, and even set up a meeting with others to discuss it with others to start with, as a start point, and then see what comes up, and take it forward" [CP12-SM, Interview-1],

and,

"I think there's typically always or should always be some level of follow-up or next steps or action items coming out of pretty much every dialogue or conversation." [CP9-SM, Interview-1].

Tension: Move from to

The Tension: Moving from to, is a code that is full of tensional language and heavily present in the texts analysed,

"During FY18, we rationalized our offering portfolio from 50+ (at NewCo day one) to 17 primary offerings. We also launched 11 new offerings in H1 and will an additional 17 offerings during H2. Sell into Delivery locations were also reduced from 46 to 13 during FY18." [p. 2 in 01-FINAL-Appendix 2b FY19 SBP CPI Presentation].

There is an expression of movement over time, a requirement to understand and move on, to act based on current state and the future state required (Figure 5-19), or because of implementing some actions (Figure 5-20).

This 'transformational' (move from to) lexicon is widely used in the IT Services market, but it's tensional in its implications, the from->to language always appears together and is ever present (2 sides of the same coin).

In summary this is a nascently explored space that warrants further investigation that was deemed out of scope of this study due to the constraints previously mentioned above.
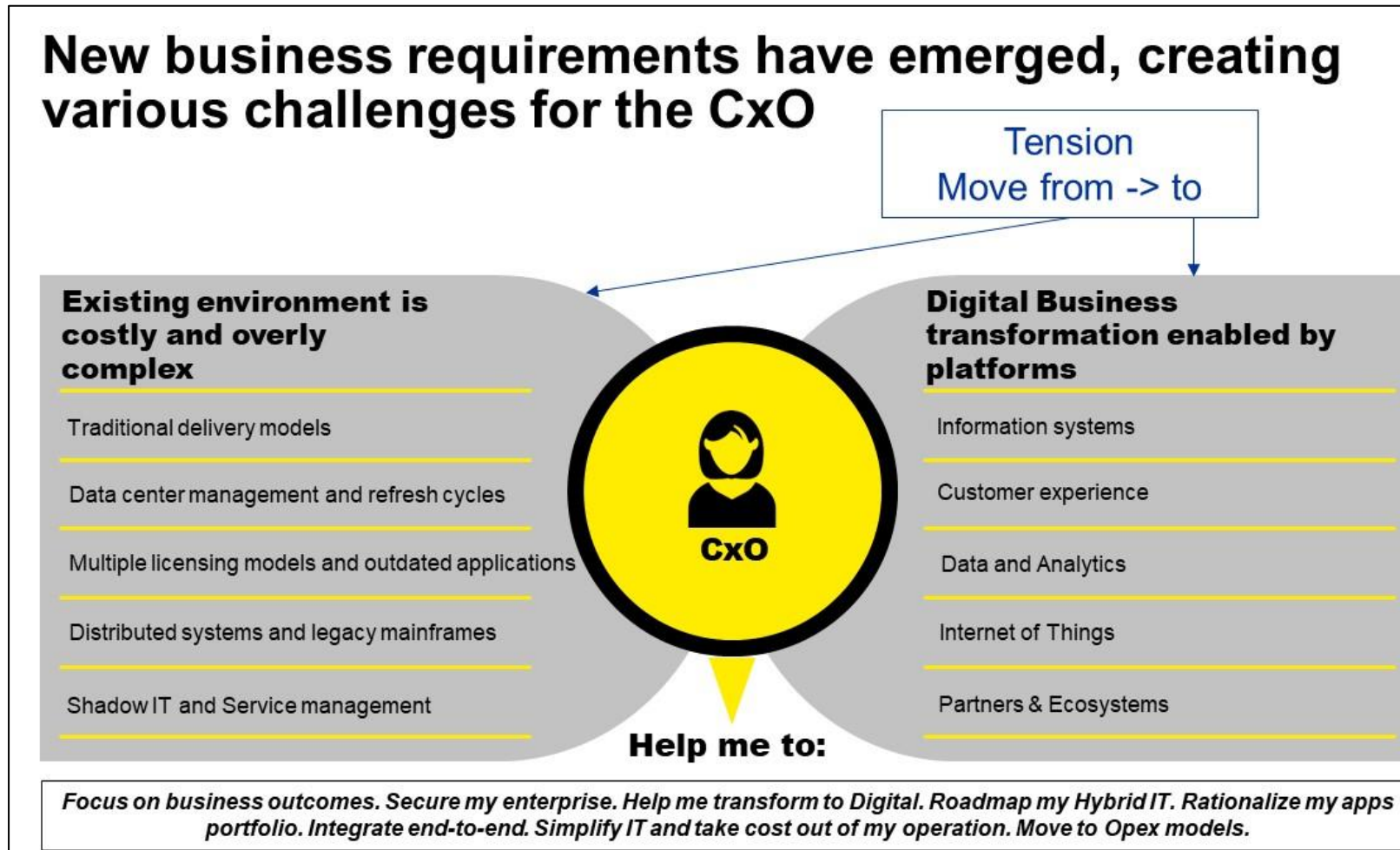
Figure 5-19: Example slide (p.4) from analysed text: Updated-CPS-CIO-vFINALv8-3

Note: Figure redacted for confidentiality.

Figure 5-20: Example slide (p.26) from analysed text: Updated-CPS-CIO-vFINALv8-3

5.3.1.6 Focused Code: Stuckness

Stuckness emerged as a sense of a failure to move on (Coded as: Stuck in a space) and/or a circling in place (Coded as: Circling around) that the conversational partners described when discussing both the overall practice and distinct spaces within the conveyance practice, e.g.,

Stuck in a space: "I've got a particular person he has bounced around from team to team for the last four years, and it's strictly a fear-based conversation. His default go to is nothing will ever, ever work and he's afraid of trying something new, and I feel that's what keeps him in that space" … "It's literally a washing machine." [CP6-SG, Interview-1].

Stuckness then defines both the act of circling and/or a failure to move on, into, through and out of spaces, across the bridge. This is a concept not previously unknown e.g., people wanting to unconsciously or consciously avoid uncomfortable situations/challenges/tensions (Lewis, 2000) or becoming stuck in a vicious cycle (while attempting to avoid change (Masuch, 1985) or paradoxical tensions (Lewis, 2000)).

Further inherent within and throughout the unfolding conveyance process there is a potential for the tensions within each space to 'hold back' a sensemakers progress through a space. In acute cases, this causes a failure of practitioners to 'move on' through the intersections i.e., those liminal spaces betwixt and between ((Turner, 1977, p. 95) cited Sturdy, Schwarz and Spicer (2006)), of the inter-related spaces of conveyance. SGs do **anticipate** that the sensemakers may become stuck at times though, e.g.,

*"I do, and umm, and I **anticipate** that they will get stuck at different spots, different individuals will get stuck in different areas" [CP7-SG, Interview 1].*

One explanation, borrowing from the heritage of sensemaking (Weick, 2015), for this stuckness may be the suggestion that, "*in situations where clarity is expected, strategic ambiguity can lead to cynicism, alienation and apathy*" (Christensen, Morsing and Thyssen, 2021). Another explanation maybe related to defence and attachment emotions underlying change that a sensemaker has to deal with (Vince and Broussine, 1996).

However, if the sensemakers don't become stuck at particular points through the bridging process, you could posit that a lessening of strategic ambiguity and increasing strategic clarity (Hoffjann, 2022) is occurring within the spaces for those sensemakers over time. As (Hoffjann, 2022, p. 284) states, "*Strategic communication oscillates between clarity and ambiguity in order to diffuse the dilemma and paradox.*".

Until recently the research on strategic ambiguity and strategic clarity, via the perspective of the Communication Constitutes Organization (COO) domain (Schoeneborn, 2011), has been approached as academically separate concepts, with strategic ambiguity on an insular island, rather than interpreted as related tensions (Hoffjann, 2022). This study however, highlights that the tensions of ambiguity and clarity occur within the organizational spaces of the 'bridging process' and the minds of the both the SGs and SMs, e.g.,

"[The] more junior people right that haven't been in the business or in this particular domain for very long then I think you need to give more clarity to those people and less ambiguity" [CP3-SG, Interview 1],

And a sensemaking practitioner attending the observed 3 Day Strategy meeting asks,

"[Can you] give us more clarity on the comparison between (those items)" during a leader's presentation [Field Notes-1_to_3rd-September2015-EMEA GrowthSumit.docx],

implying a sense of ambiguity and a need for more insight to aid their understanding in relation to what they were hearing in the narrative and seeing on the PowerPoint slides.

Ambiguity can of course give the SMs freedom to interpret, and that can allow for creative action, whereas early giving of clarity by the SGs might lead to rigid prescriptions that may not fit with the specific conditions of a portfolio of offerings an OM is managing. E.g., offerings that were not deeply understood by the SGs and where creative action could only be surfaced by the OMs. If this is the case, then SGs need to have a healthy tolerance for ambiguity and allow the SMs the flexibility and time they need.

Also of note is that the tensions of ambiguity and clarity do not appear within the same organizational space suggesting that not only are the conveyances spaces flexible but that the boundaries are permeable in relation to connected tensions. Time to negotiate, validate, work through things over time will also be important here thus the extension across boundaries of the organizational spaces.

The narrative and text conveyed and utilised by that portfolio Leader (as SG) raised the tensions of clarity and ambiguity in the mind of that sensemaking practitioner, and further, looking at Finding 1 of this study (Chapter 5, section 5.2) illustrates that the collective narratives and texts of the strategy conveyance bridging practices give life to multiple tensions within and across the 'liminal organizational spaces' (Andrews and Roberts, 2015).

5.3.2 Category 2: Tensions

The Category: Tensions, is a combination of the previously presented focused codes: Appearance of tensions (sub-section 5.2.1.5) and, Depicted tensions (sub-section 5.2.2.3). Tensions were articulated by the Portfolio Leaders and Offering Managers in numerous ways (challenges, issues, ambiguity etc.), e.g.,

"I think, I think there's a lot of challenges around those calls at the moment, because there's just so much change going on and there's so many moving pieces that each individual call, you know, can't, just doesn't have the bandwidth really to deal with it." [CP8-SM, Interview-1],

with tensions of varying 'construct' emerging from each space (Table 5-7).

'Bridging practices' space	Articulated tension	Evidence
Direction - having a Path to follow (SGs: Space to convey; SMs: Space to listen)	Do more with less	"the one that's heightened is, we have a broad portfolio of a lot of stuff, we try and do it all, but, we, we still have to do it all. We're told we've got to find the resources to, but we're told we won't get the people we want, … but yet again it's a contradiction that is built when you look at it antiseptically, and I understand, I get it, but it's a contradiction of grow but don't spend any money in the areas we're going to grow in." [CP4-SG, Interview-3]
	Grow and hold	"will grow digital and next-generation offering revenue by 27%, while holding traditional ITO services revenue at 3% decline" [Text: 00-FINAL-Appendix 2a FY19 SBP CPI Paper]
Locating context and talking with others (SGs: Space for questions; SMs: Space to check initial understanding)	Aligning (Align to direction)	"I think err sharing information as much as you can, sharing the rationale behind that information is critical so that people can get aligned to the purpose." [CP3-SG, Interview-1].
	Ambiguity (state of)	"but when there's ambiguity like that, err, people can engage in different ways" [CP3-SG, Interview-1]

Making connections, thinking (SGs: Space to think through implications; SMs: Space to think through implications)	Need clarity	"the lack of clarity about who's doing what, you know – and that took for fricking ever and a day, right – all I think are headwinds against being able to do that. And only those that are super-disciplined and super-diligent and super-organised, I think, will succeed." [CP2-SG, Interview-3]
	Market changed, go faster	"fairly fast rate of change (of the market) for quite some time umm it always seems like the most recent time is the fastest ever, unprecedented I wish I had a dollar for every time I've heard someone say that over the last 20 years." [CP7-SG, Interview-1], and **Objectives and Priorities — 'FASTER'** [p 71, EMEA Workload and Cloud Practice_FY16 Growth Summit_PRESENTATIONS.pdf]
Understanding (made) and validating (SGs: Space to validate (SM) actions; SMs: Space to confirm actions)	Interlock actions with others	"I think of interlock as reaching a point of agreement." [CP7-SG, Interview-1].
	Risk versus speed	"And actually, there was a Steer Co call that sort of will go down in… in our practice history, where I lost it, I totally lost it. I… we had a really significant red issue that needed leadership, um, action on. It was a clear escalation (of risk). You know, I'd written the slide specifically around the… the ask, and I had generated a call to action from a sense-maker to the sense-givers, right, and they didn't pick up on it. Right? And we were just about to move on… and I said, "Stop. Stop." And I said, "Look," I said, "We're crying out for help here. The slide says that we, as a practice, are not able to move forward. These are really significant issues. They are going to impact our ability to deliver, our ability to… to... to make revenue, all of those things, right, unless these things get addressed. [CP8-SM, Follow-up-Interview].

	Authority versus Responsibility	"I think people get… you know, they get assigned to stuff that they don't have… the leaders that assigned them are not giving them or not believing them the authority to go do their job." (Researcher: yeah) So… [CP4-SG, Follow-up-Interview]
Acting **(SMs: Space** **to act)**	Move from -> To	"Market Analysis: Digital needs are shifting buying factors" [Text: 01-FINAL-Appendix 2b FY19 SBP CPI Presentation]

Table 5-7: Summary of the dominant study tensions by space

Each space of the conveyance process has been shown to hold various types of tensions (Table 5-7) all of which I propose were latent (Smith and Lewis, 2011) within the existing Portfolio organization, and that, through the process of strategy conveyance became salient for the practitioners at varying points in time throughout the process. How those tensions became salient for the sensemakers, and at times for the sensegivers as sensemakers, were through the "environmental factors of plurality, change and scarcity" (Smith and Lewis, 2011, p. 389) and Portfolio participants' application of paradoxical cognition (Smith and Lewis, 2011, p. 390), evidenced in Table 5-8.

Environmental and Cognitive factors	Tensions of 'bridging process' spaces	Example evidence
Plurality[17]	Risk versus Speed Grow and Hold	"we've played at it (implementing the strategy due to competing goals and priorities) for the last 36 months" [Field Notes-1_to_3rd-September2015-EMEA GrowthSumit.docx]
Change[18]	Market changed, Go faster Move From -> To	See Figure 5-7
Scarcity[19]	Do More with Less	"The thing that I think is... really ..., hamstringing our efficiency ... people [are] being stretched in way too many different directions" [CP2-SG, Interview 2]
Cognition[20]	Align and Interlock Ambiguity and needing Clarity Authority versus Responsibility	"there's a core message that we value automation and accelerated business delivery but at the same time are not investing in our staff to be able to achieve those outcomes" [CP6-SG, Interview 1]

Table 5-8: How the tensions of spaces became salient

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[17] Plurality – expands uncertainty and surfaces competing goals of conveyed strategy
[18] Change – encourages new sensemaking as practitioners wrestle with portfolio goals and objectives
[19] Scarcity – relates to resource shortages whether practitioners, budget, tools etc.
[20] Cognition – practitioners thinking, meaning-making draws attention to underlying tensions

Looking again at Table 5-8 and the examples of evidence in the third column, it's easy to miss the conversational partners use of metaphors, e.g.,

- 'we've played at it',
- 'hamstringing our efficiency',
- 'stretched in way too many different directions',
- 'we value accelerated business delivery', and
- 'not investing in our staff'.

These metaphors are a foundational component in how tensions becoming salient, so it is worth further discussion on how metaphors link to the tensions within the organizational spaces of this study.

5.3.3 Linking tensions of spaces and metaphors

As discussed earlier in section 5.2 above, metaphors act as a bridge that involves the carrying over of meaning (Gozzi, 1999; Kovecses and Benczes, 2010).

The more I understood about metaphors by revisiting the literature (Lakoff and Johnson, 1980; Gozzi, 1999; Kovecses and Benczes, 2010), the more I looked at the data. Relationships between the metaphors employed via the narratives and texts, within each space and the associated tensions became apparent (Table 5-8).

For example, looking at the conveyance space, 'Direction – having a path to follow' and its associated tensions of 'Do more with less' and 'grow and hold' and exploring the quotations presented in Table 5-8:

"I have yet to see… any improvement in the investment *flow* to make the strategy work. If anything, I'm seeing it get worse. [CP2-SG- Interview-3].

The use of '*flow*' implies forward motion. Progress is viewed as a travel schedule but also metaphorically as motion forward, and thus progress is a form of change and conceptualized as movement (Kovecses and Benczes, 2010).

Now looking at the portion of the quotation "I'm seeing it *get worse*." [CP2-SG- Interview-3].

This is an entailment[21] of the metaphor RATE OF PROGRESS IS RATE OF MOTION FORWARD (Kovecses and Benczes, 2010, p. 165), e.g.,

- We are having difficulty in making as much progress as we need. This difficulty is a conceptualization of some kind of impediment that slows down forward motion (Kovecses and Benczes, 2010).

Next exploring the second quotation:

"will grow digital and next-generation offering revenue by 27%, while holding traditional ITO services revenue at 3% decline" [00-FINAL-Appendix 2a FY19 SBP CPI Paper].

The use of the word '*grow*' implies two things. Firstly '*grow*' is relating revenue growth to a plant, i.e., the metaphor of COMPLEX SYSTEMS ARE PLANTS, and in particular, A COMPLEX SYSTEM BECOMING LARGER IS A PLANT GROWING LARGER (Kovecses and Benczes, 2010, pp. 126-127).

Now looking at the portion of the quotation "while holding traditional ITO services revenue at 3% *decline*" [00-FINAL-Appendix 2a FY19 SBP CPI Paper], this is the metaphor REDUCING COMPLEX SYSTEMS IS MAKING PLANTS SMALLER (Kovecses and Benczes, 2010, p. 127).

Exploring these quotations above, in relation to the space 'Direction – having a path to follow' and its associated tensions of 'Do more with less' and 'grow and hold', illustrates how the metaphors used within the narratives and texts, are conveying both motion in the form of direction/flow, and growth/reduction, by likening the necessary organizational change to plants.

So, as Kovecses and Benczes (2010, p. x) state, "the function of a metaphor is to better understand certain concepts", and metaphors certainly helped to give insight into the characteristics of each conveyance space.

In summary, metaphors affect the conveyance process, and are understood tacitly and pervasively. Metaphors have implications for action that push the sensemakers towards an outcome. Metaphors can also be used and combined to convey multiple tensions within the narratives and texts without making them explicit, but practitioners will understand the implications easily.

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[21] "When rich additional knowledge about a source is mapped onto a target, we call it **metaphorical entailment**" Kovecses, Z. and Benczes, R. k. (2010) *Metaphor: A Practical Introduction.* 2 edn. Cary: Oxford University Press, Incorporated.

Metaphor Index	Space	Associated tensions	Evidence from data
Progress is motion forward, no progress is motion backwards Changes are movements (Kovecses and Benczes, 2010, pp. 164-165)	Direction - having a Path to follow	Do more with less	"I have yet to see… any improvement in the investment flow to make the strategy work. If anything, I'm seeing it get worse. [CP2-SG- Interview-3]
Complex abstract systems are plants (growing/reducing) (Kovecses and Benczes, 2010, p. 126)		Grow and Hold	"will grow digital and next-generation offering revenue by 27%, while holding traditional ITO services revenue at 3% decline" [00-FINAL-Appendix 2a FY19 SBP CPI Paper]
More is up Less is down (Kovecses and Benczes, 2010, p. 40)	Locating context and talking with others	Aligning	"moved to what's called 'above-the-line' the cut line, that, that means they're [the offerings] safe, and then those that err don't align erm as well wind up getting moved 'below-the-cut-line' so they don't get done" [CP3-SG-Interview-1]
Seeing makes knowing possible Movement from dark to light (Kovecses and Benczes, 2010, pp. 65, 186)		Ambiguity (lacking clarity)	"I think we have far too many instances of ambiguity and dupli- perceived duplication in organisational bodies. " [CP2-SG-Interview-2]

Knowing is seeing Movement from dark to light (Kovecses and Benczes, 2010, pp. 65, 186)	Making connections, thinking	Clarity (lessening ambiguity)	"depending on who the reader is or what's, you know, if you're in App Services or in CPI you can interpret what was written in the announcement different ways and then cause confu-, obviously, <u>confusion</u> in the field and then it would have to be clarified and all that. … So, I took that away, obviously, from migration and then, you know, had to, had to add clarifying points to what it really meant" [CP9-SM-Interview-1]
Progress is motion forward Changes are movements (Kovecses and Benczes, 2010, pp. 164-165)		Market changed go faster	"fairly <u>fast rate of change</u> for quite some time umm it always seems like the most recent time is the <u>fastest</u> ever, unprecedented I wish I had a dollar for every time I've heard someone say that over the last 20 years." [CP7-SG-Interview-1]
Complex systems are buildings (Kovecses and Benczes, 2010, pp. 158-159)	Understanding (made) and validating	Interlocking	"we're "pretty well <u>interlocked</u>" on the priorities across the Regions, Practice and Clusters/Sales" [Field Notes-1_to_3rd-September2015-EMEA GrowthSumit.docx]
Speed of action is speed of motion (Kovecses and Benczes, 2010, p. 165)		Risk versus Speed	"And actually, there was a Steer Co call that sort of will go down in… in our practice history, (Researcher: right) where I lost it, I totally lost it. I… we had a really significant red issue that needed leadership, um, action on. (Researcher: yeah) It was a clear escalation. You know, I'd written the slide specifically around the… the ask, and I had generated <u>a call to action</u> from a sense-maker to the sense-givers, (Researcher: yep) right, and they didn't pick up on it. (Researcher: mmhmm) Right? And we were just about to <u>move on</u>… and I said, "Stop. Stop." And \<name\> and \<name\> were on the call, and I said, "Look," I said, "We're crying out for help here. The slide says that we, as a practice, are not able to <u>move forward</u>. These are really significant issues. They are going to impact our ability to deliver, (Researcher: mmm) our ability to… to... to make revenue, all of those things, right, unless these things get addressed." [CP8-SM-Followup]
Difficulties are impediments (Kovecses and Benczes, 2010, p. 163)		Authority versus Responsibility	"Either, oh dear, yeah. So, effectively, they're… they're abdicating their <u>responsibility</u> to manage the tensions." [CP8-SM-Follow-up]

			"And I think people get… you know, they get assigned to stuff that they don't have… the leaders that assigned them are not giving them or <u>not giving them the authority</u> to go do their job." [CP4-SG-Followup]
Action is motion (Kovecses and Benczes, 2010, p. 185)	Acting	Move from -> To	"Simplify Traditional. Automation. Take cost out of operation in order to help our clients free spend to fund the <u>move to</u> Digital, Cloud-Native & Platforms" [p 5 in Updated-CPS-CIO-vFINALv8-3]

Table 5-9: Linking metaphors, spaces, and tensions

5.3.4 Thoughts on tensions: Returning to the literature

As previously stated in Chapter 2, organizational paradox is defined as "tensions that coexist and persist over time, posing competing demands that require ongoing responses rather than one-time resolutions (Lewis, 2000)" cited (Smith, 2014, p. 1592). While Putnam, Fairhurst and Banghart (2016, p. 76) suggest an addition to the often-quoted definition above, one that "adds an additional feature to the concept of paradox; that is, independent and mutually exclusive opposites reflect back on and impose on each other."

Not all the tensions, however, within the organizational spaces surfaced within this research appear at first glance to be wholly consistent with these definitions. The tensions of 'Do more with less', and 'Grow and hold' exhibit the tensions of the well documented Ambidexterity paradox (Andriopoulos and Lewis, 2009), and certain of the tensions exhibit qualities of belonging/performing/organizing paradox or combinations thereof, however some of the tensions don't always fit neatly into the four-quadrant system of Organizing:Learning:Belonging:Performing paradoxes (Smith and Lewis, 2011). The tensions of 'Ambiguity and Clarity' are recently discussed (Hoffjann, 2022) but that doesn't account for the fact that these tensions occurred in two different conveyance spaces separated by time but are still linked across the boundaries of the organizational spaces, nor that at some point ambiguity wanes and clarity rises (as the OMs move on towards action otherwise 'stuckness' would raise its head and nothing would ever be achieved with the OMs permanently stuck in a vicious cycle). Then the tensions of 'Aligning and Interlock' that again are split by time and experienced in distanced, separate spaces although linked in the minds/voices of the CPs makes me wonder what's really happening with tensions in the conveyance practices. Potentially a more suitable definition to align with for the purposes of this research is that of strategic paradoxes, which are "defined as inherent contradictions in the objectives an organization is pursuing" (Jay, 2013; Bednarek, Paroutis and Sillince, 2017) and tensions are "[s]ituations with alternative expectations and demands in opposition. Tensions describe an overarching term to include both presenting dilemmas and underlying paradoxes." (Smith, Lewis and Edmondson, 2022, p. 4).

I pick this discussion up again in Chapter 6: Discussion, given the intertwined nature of the tensions with the organizational spaces.

5.3.5 Thoughts on spaces: Returning to the literature

If "spaces and the activities performed within them constitute one another and, … are consequential for the accomplishment of strategic outcomes." (Jarzabkowski, Burke and Spee, 2015, p. S39) then we should expect to see similar strategic work happening in the organizational spaces of the portfolio conveyance practices, i.e., collaborative work, private work, and negotiating work. Interestingly there are glimpses of this type of work occurring in this research, but how it occurs appears differently given the predominantly virtual nature of the working environment and the focus on the context of strategy conveyance. For example, 'private work' is akin to the sensemakers taking time away from their immediate work action to cognitively process what they have heard/seen so they can think through the implications,

"I usually block out Friday afternoon for an hour or so just to review the week umm, so that I can apply something to next week that makes a difference, and that's usually as I go for long drives so that I can't distract myself with other things and it helps me clear my head and take a look at, the good stuff always sticks and bubbles to the top". [CP6-SG, Interview-1],

and 'negotiating work',

"a fairly mechanical negotiating process whereby everybody had to reach an agreement that here's the budget we're gonna have for spend" [CP10-SM, Interview-1].

'Collaborative work' however was less obvious in the strategy conveyance practices of this research other than the coming together of the SGs and SMs in the initial conveyance space (Space to convey: Space to listen) with the SGs directing SM attention to the strategy through the use of narratives and focusing on the pre-approved materials (strategy texts), other than accomplishing the initial presenting of the strategy and associated goals, no obvious joint activities (to implement the strategy) occurred, and I'd argue that this is due to the conveyance of strategy practices needing to occur within the portfolio group and the OMs to make sense of the conveyed strategy <u>before</u> actions can be defined and implementation begins.

5.3.5.1 Organizational Space

The topic of Organizational Space emerged during this study's iterative cycles of data gathering and analysis, and as such became a body of literature I reviewed as I conducted that analysis. Rather than reviewing the extant literature in advance of theory development so as to limit the 'forcing' of the data and instead let the theory emerge from the gathered and analysed data (Glaser, 1992) it is almost impossible to predict what academic domains

the emergent grounded theory will take. As such, what emerged from this study came as a complete surprise in the form of a series of inter-related organizational spaces (Finding 2, Chapter 5, section 5.3), necessitating a return to the literature.

The origins of organizational space within the realm of management research began with Taylor (1911) cited in (Stephenson *et al.*, 2020, p. 798) where "space was conceptualized as a stable, physical environment that managers could manipulate and control to accomplish particular goals.". However, two literature reviews focused on the topic of organizational space and conducted in 2007 and 2019 respectively (Taylor and Spicer, 2007; Weinfurtner and Seidl, 2019) advanced the thinking. Taylor and Spicer (2007) review was cast from the perspective of Henri Lefebvre (1991) and his theory of organizational space where space was seen as 'a social process that is a social product and also produces social relations.' cited (Weinfurtner and Seidl, 2019, p. 3), while Weinfurtner and Seidl (2019) review focused on distilling a basic conceptualization of space that underlies a decade's worth of literature post Taylor and Spicer (2007) early review.

A key take away from Weinfurtner and Seidl (2019, p. 1) review was that although organizational space has begun to gain attention they suggest it still remains vague with the literature highly fragmented covering multiple disciplines, levels of analysis (physical, multi-dimensional, discursive, discursive/virtual, and practical (Weinfurtner and Seidl, 2019, p. 6, Table 2)) and fields of research (Power, Leadership, SAP, Organizational Studies to name a few (Weinfurtner and Seidl, 2019, p. 3)), and, with little cross referencing occurring between authors. This fragmentation has resulted in a lack of agreement on how space should be conceptualized nor what the 'spatial turn' (Shortt, 2015, p. 634) consists of even though researchers are using the term 'space' more widely (Dameron, Le and LeBaron, 2015; Ropo and Höykinpuro, 2017; Petani and Mengis, 2021). Ultimately this fragmentation is impeding "the development of cumulative knowledge" in the field of organizational space according to Weinfurtner and Seidl (2019, p. 1).

More recently Stephenson *et al.* (2020, p. 797) stated that "the research on space has moved from a fringe area to a pivotal concern for organizational theorizing.", but also suggest that the literature related to process studies of organizational space utilize numerous theoretical lenses covering many different topics, and as such suggest "scholars need to examine the material aspects of space in conjunction with the ongoing activities, practices, and work relationships of organizational processes." (Stephenson *et al.*, 2020, p. 798).

Organizational space is a literature that is evolving through the propositions of such authors as Weinfurtner and Seidl (2019, p. 1) who developed an integrative framework of

organizational space that incorporates three concepts: Boundaries (space as something defined by a boundary), Distance (space as something that exists between different points), and Movement (space as something that is associated with (potential) movement between points or boundaries). Further Weinfurtner and Seidl (2019, p. 1) also suggest four spatial themes:

1. the distribution of positions in space,
2. the isolation of space,
3. the differentiation of spaces, and,
4. the intersection of distinct spaces.

In a similar vein, Stephenson *et al.* (2020), albeit focused on physical space, introduce the concept of 'space as a process' with the emergences of organizational space over time supported by four constructs of:

- Movement ("Flows that come together to enact spaces; the doing of space; appropriating and enacting spatial performances",
- Boundary ("Activities, practices, and material features that separate, mark, dissolve, or negotiate space"),
- Assemblages ("Forming associations, networks, and configurations of relationships among entities that define space") and,
- Scaling ("The reach of spatial configurations; the dynamics of scaling-up or down in space; activities that expand and shrink spaces" (Stephenson *et al.*, 2020, p. 801)),

coupled with five orientations (developing, transitioning, imbricating, becoming, and constituting (Stephenson *et al.*, 2020, p. 804)).

Organizational space has been looked at in numerous ways (e.g., 'white space' (Beyes and Steyaert, 2013), 'experimental space' (Bojovic, Sabatier and Coblence, 2020) 'experiential space' (Bucher and Langley, 2016), 'interstitial space' (Furnari, 2014), 'discursive space' (Hardy and Maguire, 2010), 'relational space' (Kellogg, 2009), 'differential space' (Lewis, 2008), 'body space' (Riach and Wilson, 2014), 'free space' (Rao and Dutta, 2012), and 'liminal space' (Billay, Myrick and Yonge, 2015; Shortt, 2015). However, even though researchers are using the term 'space' more widely in numerous domains, organizational space has only briefly been explored in the realms of SAP, e.g., ' mutual, dialogic and restricted space' (Jarzabkowski, Burke and Spee, 2015), 'strategy-making spaces' (Balogun *et al.*, 2014), and in the field of Organizational Paradox, e.g., 'symbolic spaces' (Carmine *et al.*, 2021). So, exploring organizational space further is worthwhile.

5.3.6 Conveyance spaces as flexible containers of experience

If we consider the concept of space as a social process with the emergence of space over time (Stephenson *et al.*, 2020) and being composed of such constructs as Boundaries, Distance, Movement, Assemblage, and Scaling (Weinfurtner and Seidl, 2019; Stephenson *et al.*, 2020), then the organizational spaces emergent within this study should be considered representative of 'containers of experience', that exhibit such parallels with the concepts of boundary, movement, assemblage and scaling (after Stephenson *et al.* (2020), illustrated in Table 5-10 below, and that flexibly bound performative sensemaking actions based on the specific tensions that emerge within each space.

Concept	Description (Stephenson *et al.*, 2020, p. 811)	Evidence
Movement	"The ongoing flows, trajectories, and shifts that enact changes."	E.g., Co-construction of spaces to convey, listen, question etc. over time, "offering management staff …, they tend to be far quicker to, to step in, step through and come out the other side of the space" [CP6-SG, Interview 1]. Transition of specific strategy related activities and spaces (Jarzabkowski, Burke and Spee, 2015)
Boundary	"The material and temporal demarcations of space among individuals, groups, and organizations."	E.g., Establishing (bounded in time and type) virtual Staff calls, off-site strategy meeting, 1-2-1 meetings, etc., "so having the SteerCos but also having daily scrum meetings across a few functional areas as well as retrospectives on a biweekly basis" [CP6-SG, Interview 1]. "Boundary work creates space by forming separations or spatial distinctions that direct ongoing organizational actions and interactions." (Stephenson *et al.*, 2020, p. 812)
Assemblage	"The configuration of human actors, practices, and material features characteristic to an organizational space."	E.g., 'The bridging process' with its SGs, SMs, organizational practices, mechanisms (Portfolio strategy narratives, texts, and activities (meetings)) and associated tensions, "So, here's an interesting thing. I looked at this [Visual of the 'bridging process'] and I thought, "Ooh! NewCo is a posterchild for what happens when this happens," Uh… because we were used to really quite interactive town halls up to the CEO level and CEO was particularly good and open at them. Yeah, really

		good. No complaints at all. And I think that… having that multi-layer clarity, first of all, when the CEO or CXO holds very open and very clear communications like that, then it… it sets an example that others all the way down the chain then follow." [CP8-SM, Follow up interview]. "how various material objects, bodies, and affective experiences connect with others to collectively perform space." (Stephenson et al., 2020, p. 812)
Scaling	"The reach or the extensiveness of a spatial configuration."	E.g., activities that scale up or down could be considered from the reach of virtual meetings to the number of attendees (Town Hall meetings could be open to all the company, while Staff calls are limited to only those direct reports of a Leader). Virtual technology extends the reach of meetings allowing participants from multiple locations and geographies to participate in those meetings (Hislop and Axtell, 2009).

Table 5-10: Comparison to the constructs of organizational space as process

In summary, organizational space then are those temporal spaces that emerged from the data analysis of this study, and given the lack of agreement on how space should be conceptualized nor what the 'spatial turn' (Shortt, 2015, p. 634) consists of, the findings from this study add to the body of knowledge in relation to organizational space.

5.3.7 Summary: Finding 2

As a reminder the research question that finding-2 relates to is:

- Question: How, and when, are tensions experienced and become relevant for the Portfolio leaders (as SGs) and Offering Managers (as SMs)?

Section 5.3 is the second of three sections pertaining to the emergent grounded theory of the portfolio strategy conveyance practices and presented the emergence of Category 1: Spaces, with five supporting sub-categories:

- Direction – having a path to follow,
- Locating context and talking with others,
- Making connections, thinking,
- Understanding and validating, and
- Acting,

and one focused code: Stuckness.

Each of these organizational spaces were grounded within the data, and act as a container of experience for the SG and SM portfolio practitioners. These spaces contain tensions (Finding 2) that are rendered salient and relevant via narratives, texts, and meetings (Finding 1):

- 'Do more with less', and 'Grow and Hold',
- 'Aligning', and 'Ambiguity',
- 'Market changed go faster', and 'Clarity',
- 'Risk versus Speed', 'Interlock actions with others', and 'Control: Authority versus Responsibility', and
- 'Move from-> To'.

Each space was perceived for the most part differently by SGs and SMs, and some of the spaces were offset in time, creating a pattern of back-and-forth practices for interaction, in summary:

- Sensegiver spaces: to convey, for questions, to think through implications, for SMs to validate actions (Figure 5-10),

- Sensemaker spaces: to listen, to check understanding, to think through implications, to confirm actions, to communicate and act (Figure 5-11).

The space 'Making connections and thinking' though was a jointly represented space for both the SGs and SMs, whereas the space 'Acting' was seen as a predominantly SM space due to the nature of that space being for the enactment of agreed work actions. Additionally, a sense of the ability of SMs to potentially become stuck, 'Stuckness' as both the act of circling and a failure to move on, in a space also emerged though none of the CP-SMs interviewed mentioned that they themselves had had this occur to them personally.

Reflecting on this section (5.3), I went looking for how, and when, tensions became relevant and were experienced by SGs and SMs. I was surprised to find a series of organizational spaces that had the concepts of flexible boundaries and movement via a flow from one space to another (Figure 5-21).
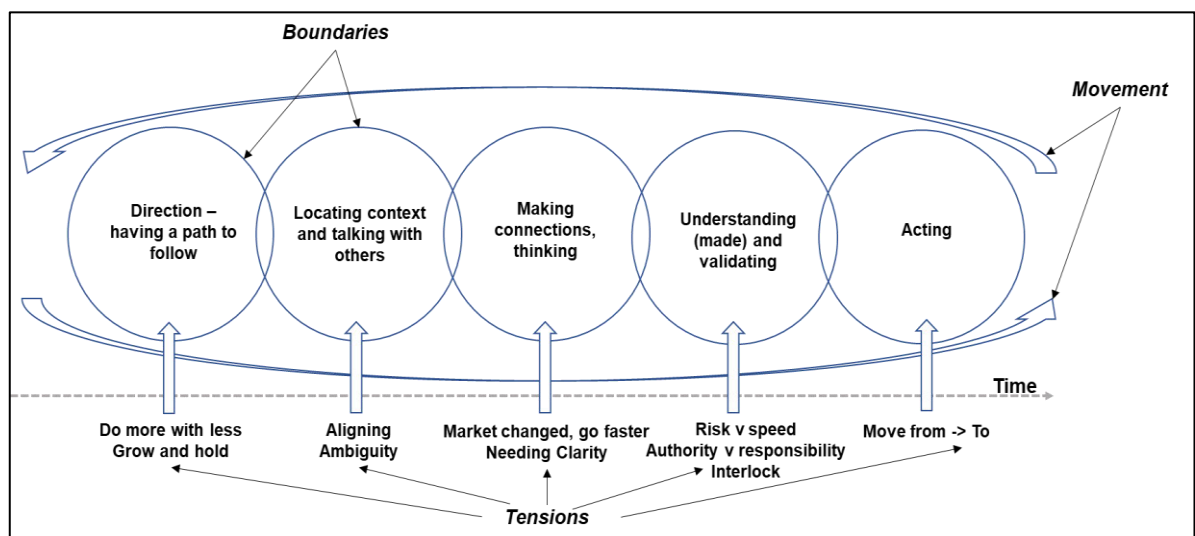
Figure 5-21: Summary of tensions per organizational space

These spaces acted as containers of experience for the sensegiving-sensemaking exchanges and cycles over time. Each organizational space exhibits certain characteristics and contains multiple tensions per space such as the tensions of paradox i.e., organizing, belonging, learning, and performing (Smith and Lewis, 2011), adaptive tensions (Boisot and McKelvey, 2010; Boisot and McKelvey, 2011), performance orientation tensions of the

developmental space paradox (Derksen *et al.*, 2019), tensions of ambiguity and clarity (Hoffjann, 2022), etc., summarized in Table 5-11.

Along with characteristics and tensions per space, a series of sensegiver attributes also emerged, see column-5 of Table 5-11, and will likely be relevant to further exploration in a future study.

Conveyance Space	Characteristic of space	Tensions within space	Types of tensions	Sensegiver attributes
Direction, having a path to follow (Sub-section 5.3.1.1)	Transference and Translation	Do more with less Grow and hold	<u>Tensions of contradicting requirements</u>: Ambidexterity paradox (Andriopoulos and Lewis, 2009) Performance orientation of the developmental space paradox (Derksen *et al.*, 2019)	Promotion of questioning Observant to use of language and metaphors
Locating context and talking with others (Sub-section 5.3.1.2)	Iterative	Aligning Ambiguity (lacking clarity)	<u>Emotional / cognitive responses to tensions</u>: Tensions of belonging (Smith and Lewis, 2011) Multiple (Putnam, Fairhurst and Banghart, 2016), nested (Berti, Simpson and Cunha, 2021) tensions Tensions of power (Berti, Simpson and Cunha, 2021) Tensions of cognition and emotions (Luscher and Lewis, 2008) Tensions of ambiguity and clarity (Hoffjann, 2022)	Promotion of dialogue Exhibit patience Allow time (for back and forth) Tolerance for ambiguity Anticipation

Making connections, thinking (Sub-section 5.3.1.3)	Reflective	Market changed, go faster Clarity (Lessening ambiguity	External pressure for internal change: Adaptive tensions (Boisot and McKelvey, 2010) Tensions of cognition and emotions (Luscher and Lewis, 2008) Tensions of ambiguity and clarity (Hoffjann, 2022) Tensions of learning (Smith and Lewis, 2011)	Oscillation between sensegiver and sensemaker Enabling time for reflection Reflexive thinking Allowing time for further questions Coaching Anticipation
Understanding (made) and validating (Sub-section 5.3.1.4)	Organizing	Risk versus speed Interlocking actions with others Control: Authority versus responsibility	Tensions of organizing (for action): Organizing (Smith and Lewis, 2011) Tensions of power (Berti, Simpson and Cunha, 2021)	Decision making Coaching Leading by example Anticipation Delegation
Acting (Sub-section 5.3.1.5)	Performing	Move from -> To	Tensions of performance: Performing (Smith and Lewis, 2011)	N/A – predominantly sensemaker space

Table 5-11: Summary of conveyance spaces, tensions, and associated sensegiver attributes uncovered

The next section (5.4) continues the presentation of the emergent theory by stating finding 3 and detailing the core category: The bridging process.

5.4 Finding 3: Strategy conveyance as a bridging process

The third finding relates to this study's primary question: **How do tensions influence the strategy conveyance process for sensegivers and sensemakers?**

The finding is stated as: **Strategy conveyance as a bridging process – The strategy conveyance bridging process is made up of a series of distinct but inter-related organizational spaces that evolve over time. Each space acts as a container of experience, rich with both verbal and visual tensions that are enabled by practitioner practices. The meetings, narratives, and texts of the practitioner practices render the tensions salient and relevant for both sensegivers and sensemakers.**

In this section (5.4), I present the **Core Category: The bridging process**, with one focused code and three categories contributing to the construction of this finding.

5.4.1 Core Category: The bridging process

The **Core category: The bridging process** (Figure 5-22), is the integration of Category 1, 2, and 3 previously presented above, plus one additional focused code: Time:

Category 1: Practices (section 5.2),

Category 2: Tensions (sub-section 5.3.2),

Category 3: Spaces (section 5.4), and

Focused Code: Time.

Category 2: Tensions
• Apperance of tensions (Verbal)
• Depiction of tensions (Visual)
• Tensions of spaces

Category 3: Spaces
• Sub-categories:
  • Direction - having a Path to follow
  • Locating context and talking with others
  • Making connections, thinking
  • Understanding and validating
  • Driving movement for action
• Focused Code: Stuckness

Category 1: Practices
• Narratives
• Texts
• Meetings

The bridging process

Focus Code:Time
• Past
• Present
• Future
• Evolving

Figure 5-22: From codes and categories to Core Category: The bridging process

With **Category 1: Practices, Category 2: Tensions**, and **Category 3**: **Spaces,** previously presented in sections 5.2, 5.3.1, and 5.3, respectively, I now present the final code to emerge, the **Focused Code**: **Time**.

5.4.2 Focused Code: Time

The **focused code: Time** was constructed from the narratives, observational field notes, and texts analysed, throughout the data gathering and analysis iterations of the study.

The code 'Time' emerged from numerous time-related initial codes, coalescing into five code groupings (Figure 5-23) which were coded as follows:

- Evolving,

- Future,

- Past,

- Point in time, and,
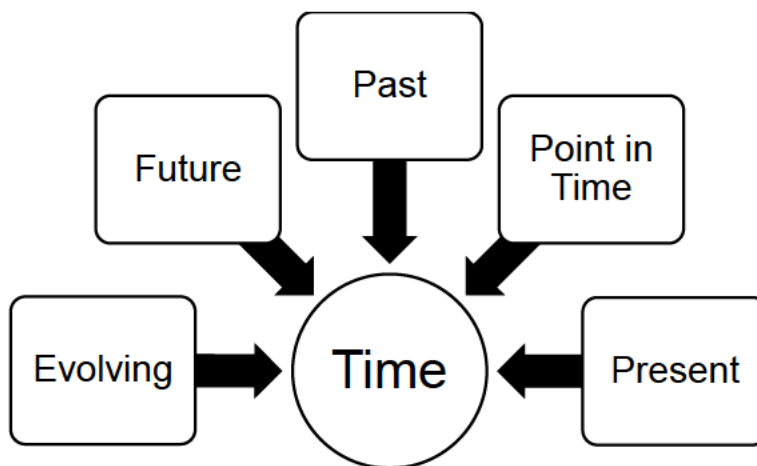
- Present.

Figure 5-23: Codes to Focused Code: Time

Time was always portrayed as an evolving motion (Table 5-12) and one that represented numerous 'versions' of time: evolving, future, past, point in time, and present. The way in which I chose to code these multiple versions of time was based on a revisit of the literature (sub-section 5.4.4 below) with a particular focus on "how time is" (Holt and Johnsen, 2019). I.e., how time appears and is experienced by practitioners, and 'other time' where Shipp and Jansen (2021, p. 301) define "subjective time is the experience of the past, present, and future, which occurs as individuals (intrasubjectively) and collectives (intersubjectively) mentally travel through, perceive, and interpret time.". Time though is nevertheless composed of both objective clock time and subjective event-time (Orlikowski and Yates, 2002; Shipp and Jansen, 2021).

The way in which the CPs comprehended time in their narratives (Table 5.12) led me to apply the following rudimentary definitions of each 'version' of time as I coded the data:

- Evolving: The unfolding experiences of change over time,
- Future: The events and experiences that should/would happen later,
- Past: Reflecting on things e.g., documents, narratives and/or events, that had already occurred,
- Point in Time: Reflecting on specific past events and/or experiences that do not represent with the here and now, and,
- Present: The here and now, things such as events and work activities/tasks, that were happening in the moment or needed to happen imminently.

Time	Description	Evidence
Evolving	Unfolding	*"but over time that's morphing into industry led solutions" [CP5-SG, Interview 1]*
Future	Ahead	*"the Financial planning tends to be a yearly, the PoR process tends to be 12-18 months, the Visioning/Strategy from an offering tends to be 12-36 months and the Account planning tends to be 36 months, so they've all got different timescales" [CP5-SG, Interview-1]*
Past	Behind (Previously occurred)	*"It, it is… It's funny. I, I'll, I'll, um, I'll read things and, and, um, I never know what's going to come back later at a moment where I'm not sitting at my computer and formally doing work. I'll be driving the car and, um, er, of the 20 things that I've read that day something'll hit me as, as important about something that I have read. And it could be one of the strategy documents, could be something else. It could be something, you know, that I, that I had a re-, a realisation reading between the lines of something that somebody had said that I hadn't, hadn't hit me at first." [CP10-SM, Interview-1]*
Point in time	Moving times, connecting past with present, and future (Keeping up with)	*"so, you know, we announced our, our offerings in our organisation in April, right, and they were CPI and… So, I just still have people on the team in migration, they're still calling themselves Global Design and Engineering, and I'm like, Guys, that was six months ago! <laughs> That's gone! Like, you know what I mean? It's like what… it's like you said, "Are you guys under a rock?" You know, that's, that's the old model. We're in the new model. Everyone's got to sign up for it, right." [CP9-SM, Interview-1]*
Present	The here and now	*"if we release this this month and release that other thing next month then we'll get to the 3-year vision." [CP6-SG, Interview-1].*

Table 5-12: Representations of time emergent from the data

Ultimately all five of these 'versions' of time, i.e., Evolving, Future, Past, Point-in-time, and Present, can be thought of as predominantly 'travelling through time'. This "traveling through time occurs when individuals or collectives retrospect or anticipate experiences at other points in time, mentally moving back and forth across the past, present, and future." (Shipp and Jansen, 2021, p. 304). Both 'present' and 'future' within the data also exhibited the concept of 'perceiving time' i.e., temporal structures representing the past, present, and future (Shipp and Jansen, 2021), used to structure and organize, which followed the rhythm of events, e.g., SteerCo meetings or Offering releases).

Time then, within this study, is a sequence of experiences and events over time that includes past, present, and future. Time is constantly evolving but also intertwined with the spaces within and throughout the conveyance of strategy process. The way in which the SGs and SMs talk about time relates to the characteristics of each space within the strategy conveyance process, summarized in Table 5-12 below. Further, there is a relationship between the characteristics of each space, the tensions per space, and the characteristics of time (Table 5-13), e.g.,

- The space 'Direction, having a path to follow', with the spatial characteristics of transference and translation, exhibits a relationship to the characteristics of time i.e., evolving from the past and the present state towards a new future state, that aligns well with the notions of transference and translation.

- The space 'Making connections, thinking', with the characteristic of reflection, exhibits time characteristics of connecting the past to the future through a process of reflecting backward to move forward.

Conveyance Space	Characteristic of space	Tensions within space	Characteristic of time	Evidence
Direction, having a path to follow (Sub-section 5.3.1.1)	Transference and Translation	Do more with less Grow and hold	Evolving from the past and the present towards the future	*"but over time that's morphing into industry led solutions"* [CP5-SG, Interview 1].
Locating context and talking with others (Sub-section 5.3.1.2)	Iterative	Aligning Ambiguity (lacking clarity)	Point in time, moving with the times, connecting past with the present and future	*"so, you know, we announced our, our offerings in our organisation in April, right, and they were CPI and… So, I just still have people on the team in migration, they're still calling themselves Global Design and Engineering, and I'm like, Guys, that was six months ago! <laughs> That's gone! Like, you know what I mean? It's like what… it's like you said, "Are you guys under a rock?" You know, that's, that's the old model. We're in the new model. Everyone's got to sign up for it, right."* [CP9-SM, Interview-1]
			Circling around	*"we gotta get out of that spin cycle as quickly as possible"* [CP2-SG, Interview-1].

Making connections, thinking (Sub-section 5.3.1.3)	Reflective	Market changed, go faster

Clarity (Lessening ambiguity | Connecting the past to the future through reflection | *"I think of <Offering name> is one …, where it is* today *as a stand-alone business probably made sense* 15 years ago *but does really make sense* today *[implying the future]. [CP4-SG, Interview-3].* |
| **Understanding (made) and validating** (Sub-section 5.3.1.4) | Organizing | Risk versus speed

Interlocking actions with others

Control: Authority versus responsibility | Planning for the future | *"we* build out our plans*" [CP3-SG, Interview-1].* |
| **Acting** (Sub-section 5.3.1.5) | Performing | Move from -> To | In the present, performing actions of the here and now to attain the future | *"if we* release this this month and release that other thing next month then we'll get to the 3-year vision.*" [CP6-SG, Interview-1].* |

Table 5-13: Connecting conveyances spaces, tensions, and characteristics of time

5.4.3 Thoughts on time: Returning to the literature

The way in which tensions appeared and were depicted was shown to be inherent within the language, lexicon and metaphors used (section 5.2) within both the strategy narratives and texts, which when combined with the regular work activities (defined portfolio meetings) of the SG/SM practitioners, brought to life the tensions inherent within the organizational spaces (section 5.3) of the conveyance practice which unfolds over time (sub-section 5.4.2).

Thinking about this section (5.4) made me consider how interesting the concept of time was within the data as at the onset of the study I knew I would need to consider the nature of time, however what struck me in particular was the subjective features of time that were present both within each organization space, through the holistic whole of the conveyance practice, and how events helped structure the activities component of the collective mechanisms that enabled each space. That is not to say that objective time did not appear, but the sensegiving-sensemaking processes occurring throughout the conveyance practices appear to be highly subjective in nature.

5.4.3.1 Time

The topic and nature of time is an age old one philosophically, scientifically and from a religious viewpoint (Whitrow, 1972). However, more recent literature discussions are pertinent to the study of organizations (Ancona *et al.*, 2001; Holt and Johnsen, 2019; Kaplan and Orlikowski, 2013; Shipp and Jansen, 2021).

Given that the IT strategy conveyance process operates along an unfolding objective timeline that has a sense of some urgency associated with it which creates pressure to move forward and is interspersed with events of subjective time for both the SGs and SMs individually and collectively during interactions (e.g., during Staff calls, meetings, one-to-ones etc.), applying the lens of time is an important consideration for aiding explanation of this study's findings.

In their paper titled Time: A new research lens, Ancona *et al.* (2001, p. 645) suggested that "focusing multiple lenses on a given phenomenon highlights different aspects of that phenomenon, and that although time plays a role in each other lens, time itself is usually on the periphery. Further, Ancona, Okhuysen and Perlow (2001) in another paper of the same year, suggested that little dialogue existed across research disciplines in relation to time, especially given the proliferation of research on time which "has always been at the foundation of organizational theory" (Ancona, Okhuysen and Perlow, 2001, p. 512).

Ancona, Okhuysen and Perlow (2001, p. 520) go on to layout three overarching categories and supporting sub-categories of time based on their review (albeit from the viewpoint of looking for variables that represented other researchers concerns when researching time):

1. The conception of time:

    a. types of time e.g., 'clock time', 'cyclical time', 'event time', 'life cycle', 'unpredictable time', and 'predictable time',

    b. and time as socially constructed - where different social/cultural groups construct different types of time.

2. Mapping activities to time:

    a. Single activity mapping - the scheduling of an activity on the continuum of time),

    b. Repeated activity mapping - where a single activity is repeated multiple times,

    c. Single activity transformation mapping - where a qualitative transformation occurs during the execution of an activity,

    d. Multiple activity mapping - execution of multiple activities that are related.

3. Actors relating to time:

    a. Temporal perceptions - the experience of time varies across conditions and actors,

    b. Temporal personality - the way in which an actor perceives, interprets, uses, allocates or otherwise interacts with time.

Although Ancona, Okhuysen and Perlow (2001) review was quantitative in approach, "in many ways is analogous to factor analysis" (Ancona, Okhuysen and Perlow, 2001, p. 513), they do highlight the potential for time to be a socially constructed endeavour. Ancona, Okhuysen and Perlow (2001) also suggest that by using a temporal lens, thought is not just focused on the processes and practices of organizations, but also how quickly those processes and practices are moving (Huy, 2001), the trajectory they take, the cycles they align with (Ancona *et al.*, 2001) and the positioning on the continuum of time.

The temporal lens is taken further by Orlikowski and Yates (2002) who combine the temporal lens with a practice perspective to propose the construct of 'temporal structuring' as a way to both study and better understand time as it is enacted within organizations, thus bridging between the objective, often characterized as 'clock-time' and subjective, often characterized

as 'event-time'[22], views of time, themselves (objective-subjective time) often thought of as contradictory/paradoxical (Orlikowski and Yates, 2002). Their suggestion, taking a practice-lens which requires studying time in organizations by looking at what practitioners 'do in practice' and how that 'doing' shapes the temporal structures that then shape those practitioners, is that "through their everyday action, actors produce and reproduce a variety of temporal structures which in turn shape a temporal rhythm and form their ongoing practices." (Orlikowski and Yates, 2002, p. 684), and that by integrating social practices (in organizations) and the theory of structuration (Giddens (1984) cited (Orlikowski and Yates, 2002, p. 685)) would be helpful in the study of organizations and time.

Moving on more than a decade the conversation turns to how much research time has been spent on the study of organizations, but that time has become more concealed, i.e., "There has been a progressive forgetfulness of time in organizational studies." (Holt and Johnsen, 2019, p. 1) even though time has become an integral part of practice- and process-based studies (Kaplan and Orlikowski, 2013; Langley *et al.*, 2013) and albeit that time remains something to be 'managed', "we organize time, it does not organize us." (Holt and Johnsen, 2019, p. 1), in so doing researchers have forgotten the topic of "unmanaged and ungovernable time." (Holt and Johnsen, 2019, p. 2). Holt and Johnsen (2019) suggest instead that research into organizations should ask 'how time is' (how time appears and is experienced by practitioners) rather than 'what time is' (the characterization of time) which dove-tails nicely with Shipp and Jansen (2021) recent review of the study of "other" time, and in which they define "subjective time is the experience of the past, present, and future, which occurs as individuals (intrasubjectively) and collectives (intersubjectively) mentally travel through, perceive, and interpret time." (Shipp and Jansen, 2021, p. 301) allowing them to ask the questions of: what is subjective time, how does it operate, and why does it matter?

Intersubjective time refers to how collectives cocreate the experience of time through social construction, while Intrasubjective time talks to how individuals experience time via their view of the past and the future which Shipp and Jansen (2021, p. 303) refer to as "psychological time travel". This 'time travel' allows an organization's participants to perceive, interpret, and connect the past to the future (through temporal structures of the past, present, or future), and one would expect an important concept needed during the conveyance of strategy for

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[22] For example: Weekly meeting schedules, project deadlines and financial reporting periods classified as 'Objective time', while social products of collective organizational sensemaking (including norms, beliefs, and customs) as 'Subjective time' Orlikowski, W. J. and Yates, J. (2002) '"It's about Time: Temporal Structuring in Organizations."', *Organization Science,* 13(6), pp. 684-700.

some (potential) understanding that results in action, alongside being important for the process of maintaining continuity and change at the same time.

How subjective time operates (Shipp and Jansen, 2021) suggest is through the mechanisms of Attending, Preparing, and Comprehending, where:

- Attending: refers to the means by which individuals and collectives direct their attention to the past, present, or future to inform current experience, and is made up of four functions (Focus of attention, Temporal comparison, Temporal influence, and Learning),

- Preparing: refers to how individuals and collectives think about, plan for and act towards future expectations in the here and now. Preparing is supported by four functions (Projection, Temporal allocation, Time awareness, and Temporal construal), and,

- Comprehending: how individuals and collectives holistically understand and connect the past, present, and future. The three functions of 'comprehending' are Narrative, Meaning, and Sensemaking.

Although several articles have applied subjective time to existing research domains (innovation, strategy, communication, strategic decision making, organizational identity) in order to generate insights about organizational management (Shipp and Jansen, 2021), they are all context specific. Gaps therefore exist in the study of time in relation to the topic of organizations, with suggesting three potential options for the future of research on subjective time in organizations:

i) Introduction of subjective time to a research domain based on one of the applicable mechanisms (Attending, Preparing, or Comprehending),

ii) Expand the comprehensive usage of subjective time within a research domain to understand more fully the types of impact subjective time has, and,

iii) Deepen the understanding of subjective time itself (Shipp and Jansen, 2021, pp. 318, Table-5).

Time then "has always been at the foundation of organizational theory" (Ancona, Okhuysen and Perlow, 2001, p. 512) and given the longitudinal and process nature of this study it is an important concept to explore that may further understanding of how time is enacted within organizations, focusing on the bridging between the objective (often characterized as 'clock-

time')-subjective (often characterized as 'event-time')[23] views of time, themselves often thought of as contradictory/paradoxical (Orlikowski and Yates, 2002).

In conclusion, the role of time in the strategy conveyance process is about the relationship between the sensegiving-sensemaking process and finding a way forward with the tensions in each space.

5.4.4 Summary: Finding 3

As a reminder the research question that finding-3 relates to is:

- How are tensions experienced and become salient for sensegiving leaders and sensemaking managers?

Section 5.4 presents the final category, i.e., the core category: The strategy conveyance bridging process. Section 5.4 integrates the categories of Practices, Tensions, and Spaces, with the focused code: Time. Collectively these categories and codes make up the evolving process of strategy conveyance (Figure 5-24).
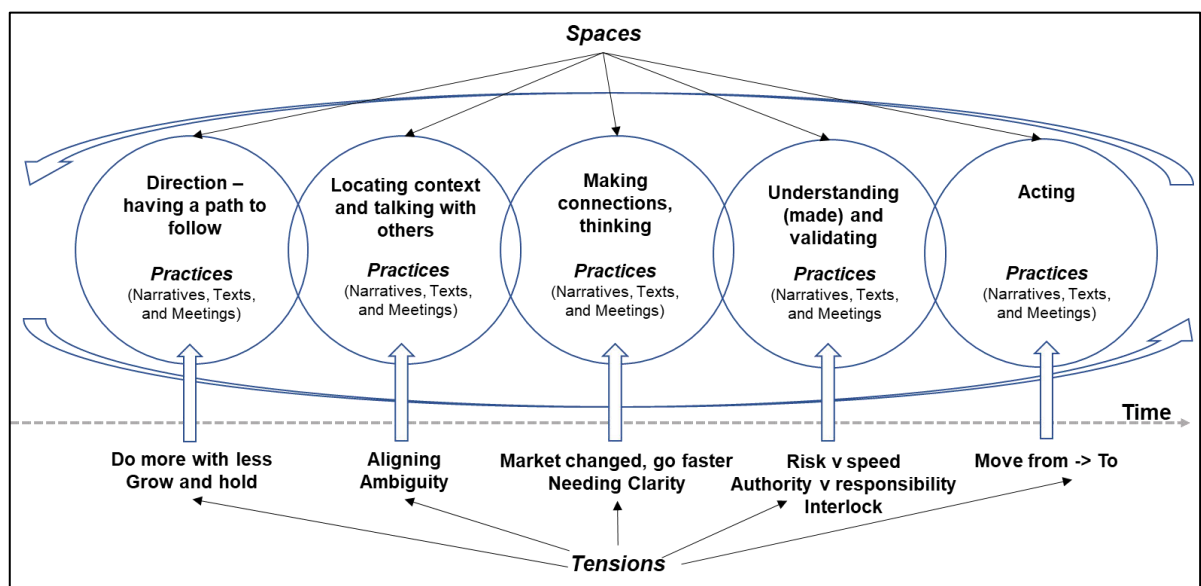
Figure 5-24: Analytical Framework: The Conveyance of Strategy Bridging Process

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[23] For example: Weekly meeting schedules, project deadlines and financial reporting periods classified as 'Objective time', while social products of collective organizational sensemaking (including norms, beliefs, and customs) as 'Subjective time' ibid.

In summary the core category: The strategy conveyance bridging process is an integration of:

Category 1: Practices (section 5.2), which exposed that the language, lexicon (Table 5-3), visuals, and metaphors (Table 5.2) used in narratives and texts of strategy conveyance render tensions visible and salient (Table 5-4) for the portfolio practitioners via meetings (Table 5-1). In particular, the metaphors acted to give structure to the flow of tensions throughout the spaces of the conveyance practices over time.

Category 3: Spaces (section 5.3), uncovered the concept of organizational space as 'flexible containers of experience', and having the constructs of boundaries, movement, assemblage, and scaling (Stephenson *et al.*, 2020), Table 5.10. Each space has also been shown to exhibit certain characteristics per space and to contain several types of tensions (Table 5-10).

Category 2: Tensions (sub-section 5.3.2), These 'containers' hold the emerging tensions (Table 5-7), allow the sensemaking process to unfold, and render the tensions relevant to the portfolio practitioners through the "environmental factors of plurality, change and scarcity" (Smith and Lewis, 2011, p. 389) and practitioners paradoxical cognition (Smith and Lewis, 2011, p. 390), (Table 5-8).

Focused code: Time (sub-section 5.4.2), discussed a sequence of subjective experiences and objectives events that evolved over time. Time is constantly evolving but also intertwined with the spaces within and throughout the conveyance of strategy process. The way in which the SGs and SMs talk about time relates to the characteristics of each space, and further, there is a relationship between the characteristics of each space, the tensions per space, and the characteristics of time (Table 5-13).

Reflecting now on this section, has made me recognize how complex, intertwined, and entangled the process of strategy conveyance is, no wonder it is so hard for practitioners to get it right 100% of the time! I started from a point of thinking tensions were the lynchpin in the conveyance process but found there is so much more in play e.g., practitioners sensemaking, organizational spaces, tensions, language, and metaphors, and both subjective and objective time. I was also surprised at the sensegiver attributes that bubbled up to the surface in relation to each conveyance space (Table 5-11) and the potential usefulness this may have to the practitioner community.

5.5 Developing a conceptual framework

Throughout the study the use of the visual concept of a suspension bridge served well to anchor the evolving study discussion (Table 5-14), through the four data gathering and analysis iterations presented above, and onward towards the construction of a more simplified visual, that of the conceptual framework (Figure 5-25).

From descriptive visual to theoretical framework	Study Phases	Who/What [Mechanisms]	Why	Evolution of Question(s)	How (GTM – Charmaz 2006)	Outcomes
Bridge as a Metaphor	Iteration 1a	Portfolio Leaders (SGs) [Qual interviews]	Context setting	Practitioner question	Line-by-Line, In vivo, Gerunds (Initial coding)	Initial codes
	Iteration 1b - Member checking	Portfolio Leaders (SGs) [Qual interviews]	Check researcher early interpretation	Initial academic question(s) defined	Refine, compare & contrast (Reflection & Descriptive Memos)	Glimpses of challenges and identification of conveyance mechanisms
Suspension Bridge described / related to scoping literature	Iteration 2	Regional Portfolio Team (SGs and SMs) [Insider Ethnographic Observations]	Observe the portfolio strategy conveyance process		Line-by-Line, In vivo, Gerunds (Initial coding); Constant comparison to refine Initial coding table and form early Focused codes (Focus coding & Reflective Memos)	Spaces and Tensions emerge
Analytical framework 'The bridging process'	Iteration 3	Texts [Genre Analysis]	How are texts used in the portfolio strategy process	Academic questions reordered	Constant comparison to begin to saturate Initial and Focused codes (Analytical Memos)	Categories begin to form and initial analytical framework strengthens
	Iteration 4a	Portfolio Leaders (SGs) [Qual interviews]	Explore deeper the spaces, tensions, relationships, and interdependencies	Academic questions evolved	Constant comparison to saturate categories; Early theory building (Theoretical Memos)	Categories tighten and Core Category 'The bridging process' integrates the 'whole'
	Iteration 4b	Offering Managers (SMs) [Qual interviews]				
Conceptual framework 'The strategy conveyance bridging process'	Iteration 4c - Member checking	Portfolio Leaders & Offering Managers [Qual interviews]	Check the framework and findings	What can be explained and what not in relation to the study questions	Deepen the theoretical framework (Theoretical Memos); Revisit the literature for insights and gaps	Towards a theory

Table 5-14: Evolution from visual metaphor to the theorized process - The Strategy Conveyance Bridging Process

The theorized process illustrates the relationships between each category, summarized into the core category, i.e., The strategy conveyance bridging process.

Simultaneously with the evolution of the visual metaphor three theoretical findings emerged from the data analysis as follows,

Finding 1: Narratives and texts are carriers of tensions - The tensions of strategy conveyance are inherent within the language, lexicon, and metaphors used in both the sensegiver narratives and texts (both stated and implied) throughout the conveyance practices. Further, the metaphors utilized structured the tensions in a way that makes those tensions salient thus allowing the sensemakers to notice the implications to themselves and their work.

Finding 2: Conveyance spaces as containers of experience - For both the sensegivers and sensemakers, tensions become relevant throughout the conveyance of strategy in a series of interrelated and evolving flexible 'containers of experience' (organizationally constructed spaces) over time.

Finding 3: Strategy conveyance as a bridging process – The strategy conveyance bridging process is made up of a series of distinct but inter-related organizational spaces that evolve over time. Each space acts as a container of experience, rich with both verbal and visual tensions that are enabled by practitioner practices. The meetings, narratives, and texts of the practitioner practices render the tensions salient and relevant for both sensegivers and sensemakers.

The following conceptual framework (Figure 5-25) illustrates the main theoretical concepts, the development of which have been presented throughout this chapter with discussion and illustrations of evidence to demonstrate how the categories and codes emerged from and are grounded within the data. The linkage of, and relationships between the categories unfolded during the data analysis iterations, and to make sure of my interpretation I reconnected with the CPs and asked for their perspective on the framework (member checking/participant validation, (Birt *et al.*, 2016)).

Figure 5-25 presents a summary of the entire strategy conveyance bridging process (SCBP) theory. This diagram centres on an evolving series of organizational spaces, over time, that are enabled by practices which render tensions salient during the sensegiving-sensemaking process of strategy conveyance.

Assemblage

Boundaries

Spaces

Movement

| Direction – having a path to follow | Locating context and talking with others | Making connections, thinking | Understanding (made) and validating | Acting |

Practices
(Narratives, Texts, and Meetings)

Practices
(Narratives, Texts, and Meetings)

Practices
(Narratives, Texts, and Meetings)

Practices
(Narratives, Texts, and Meetings)

Practices
(Narratives, Texts, and Meetings)

Time

Do more with less
Grow and hold

Aligning
Ambiguity

Market changed, go faster
Needing Clarity

Risk v speed
Authority v responsibility
Interlock

Move from -> To

Tensions

Key:
- *Assemblage*: the fluid and changing configurations of practitioners, praxis, and practices
- *Boundaries*: the evolving physical, mental and/or social demarcations of the sensegiving and sensemaking practitioners
- *Practices*: the combination of narratives, texts and meetings that activate tensions within organizational spaces
- *Movement*: the ongoing actions, drivers, direction, flow, journey and connections through the conveyance process
- *Spaces*: the 'containers of experience'
- *Tensions*: the challenges, issues, problems, dialectics, and paradox etc. experienced within the organizational spaces
- *Time*: the objective and subjective perceived/experienced by practitioners through the unfolding of the conveyance process

Chapter 5, section reminder:
- Practices – section 5.2
- Spaces – section 5.3
- Tensions – section 5.3.2
- Assemblage, Boundaries, and Movement – section 5.3.7
- Time – section 5.4.2

Figure 5-25: Conceptual framework: The Strategy Conveyance Bridging Process (SCBP)

5.6 Positioning the SCBP

Having discussed each of the component parts within the SCBP, it's also important to position this theorizing and to explore what is meant by the term 'theory', under grounded theory. This includes discussing how the SCBP is positioned as a methodological framework. The accepted theories within GTM are substantive theory and formative theory (Glaser and Strauss, 1967). Substantive theories are not necessarily generalizable to the larger population, in that they describe individuals drawn from a similar population to that of the study's sample population (Remenyi, 2014). A theory can only be described as 'formative' if its conclusions are shown to be valid across different populations or as the result of deductive reasoning and logic that utilizes validated empirical theories as their basis (Remenyi, 2014). The SCBP offers a conceptual theory that is substantive in terms of providing a theoretical explanation for the specific context of the conveyance of strategy entangled with tensions, in an IT Services Portfolio organization.

Each theory should be approached according to the paradigm within which it was conducted, i.e., from a positivist or constructionist perspective. As discussed in Chapter 3, this study followed the principles of a constructionist ground theory strategy. Constructionist theory places priority on the studied phenomenon and sees both data and analysis as created from those shared experiences and relationships of the participants and other sources of data (Bryant, 2002; Bryant and Charmaz, 2011; Charmaz, 2014). Charmaz (2014) consistently advocates for a constructionist approach to not only data gathering and analysis, but also the subsequent interpretation of the theory. Constructionists study why and how participants construct meaning, and actions, in specific situations (Bryant, 2002; Charmaz, 2008a; Charmaz, 2008b; Charmaz, 2011; Charmaz, 2014). As a result, the SCBP not only looked at how the practitioners viewed their situation but also acknowledges that the resultant theory is an interpretation. As a constructionist grounded theorist, I took a reflective/reflexive approach towards the research process and product (Charmaz, 2016). It is therefore acknowledged that the SCBP is a product of the research process, influenced by my perspectives, experiences, interactions and insider researcher status. This is why using gerunds to code for actions, memoing and diagramming, a variety of primary data, and regular checking back with my conversational partners throughout the theory development were integral to the lessening of bias, while helping me stay sensitive and true to the data (Chapter 4).

In summary, the SCBP presents the first theoretical understanding and interpretation of IT strategy conveyance as a process, and so the findings from the SCBP should be applied with

caution. The contributions chapter (Chapter 7) explores the quality and limitations of the SCBP, as well as suggestions for practitioner practice, in further detail.

5.7 Summary Chapter 5

In summary, this study's evolution towards the findings through the presentation of the emergent categories and focused codes, followed the design and methods detailed in Chapter-4. Three, (3) theoretical categories, Practices, Spaces, Tensions, and one focused code: Time, emerged from the data analysis. Each finding produced insights into the core category: The Bridging Process, during strategy conveyance and, surfaced the associated tensions affecting the participating sensegivers (Portfolio VP/Directors) and sensemakers (Offering Managers) throughout the process.

This chapter presented three findings, covering each resultant theoretical category and focused code in-turn, that in combination result in the core category: The Strategy Conveyance Bridging Process, made up of:

- Category 3: Practices,

- Category 1: Spaces,

- Category 2: Tensions, and

- Focused Code: Time.

The visual metaphor for this study, that of a suspension bridge, continued to evolve through the data gathering and analysis stages of this study, as the core category formed, from an analytical framework (Figure 5-24) to a conceptual framework (Figure 5-25) that anchors the codes and categories emergent from the data.

To recap, the components of the **Core Category: The bridging process** are:

The **Practices** of conveyance took multiple forms, predominantly virtual in nature, e.g., virtual Conference calls, One-to-one meetings, Staff calls, Town Hall calls, SteerCo meetings and onsite Strategy meetings (physical in person attendance). Narratives and texts acted to facilitate the conveyance praxis throughout these various types of activities/meetings/interactions.

Spaces represent where the organization's participants interacted with each other, with artefacts and/or, with their own cognitive processes. Throughout the conveyance process, spaces were brought into existence by both sensegivers and sensemakers. Sensegivers enabled spaces to support the conveyance of strategic direction, while sensemakers utilized

spaces to aid and validate their understanding. The concept of '**stuckness**' also surfaced within the category: Spaces, discussing the potential for practitioners to circle within a space or even to fail to move on, into, through and out of spaces, within the conveyance process. For practice, a set of attributes per space for sensegiver to exhibit/practice helped characterize each space and creating/facilitating these spaces should be considered as part of the practice toolbox for strategists.

Tensions were raised by the conversational partners and captured by the researcher when reviewing the narratives, primary texts, and observational field notes. Tensions were articulated in numerous ways, e.g., as concerns, challenges, blockers, impacts, obstacles, changes, tensions, ambiguity and needing clarity. Conveying the tensions tacitly and explicitly is part of the praxis of sensegivers and working through those tensions is the praxis of sensemakers.

Time represents the evolution through time of the conveyance process and the spaces within/across it (the bridging process).

The discussion chapter (Chapter 6) will now follow. Chapter 6 provides context for the Strategy Conveyance Bridging Process by discussing how the findings and resultant conceptual framework relate to other evidence.

6   Discussion

"One's destination is never a place, but a new way of seeing things." - Henry Miller.

6.1 Introduction and chapter structure

In this study, I explored the practices that occurred at the interface between sensegivers and sensemakers during the conveyance of strategy. In this chapter, I examine the relationships between the findings and begin "pulling the pieces together" (Charmaz, 2014, p. 290) within my interpretive theorizing that I called the 'Strategy Conveyance Bridging Process' (SCBP). In this chapter I have formed the discussion around the idea that the practices of strategy conveyance resonates with the metaphor of a bridge as I found that the features unifying the findings and propositions align with features recognizable with that of a suspension bridge. The Constructionist Grounded Theory approach (Charmaz, 2014) adopted in this study focused my attention on the context, practitioner sensegiving-sensemaking, the practitioner praxis and practices (Jarzabkowski and Whittington, 2009) at the interfaces of the strategy conveyance process and the dominant tensions that surface through the process (Jarzabkowski, Lê and Bednarek, 2018). This approach allowed me flexibility to iterate throughout the analysis process and consider the findings more imaginatively. The components of the bridge, the suspension cables & beams (section 6.2) i.e., the practices (narratives, texts, and meetings), the points along the roadway of the bridge, i.e., spaces (section 6.4), and the external forces that promote continuity and change to the structure of the bridge (section 6.5), i.e., those cycles of strategy practitioner praxis, and the tensions that surface, are shaped by the sensegiving-sensemaking process that occurs during strategy conveyance (moving across the bridge).

The remainder of this chapter is structured as follows:

- Section 6.2 presents an overview of the study, it's background, methodology and methods,

- Section 6.3 considers the cables and beams of the bridge: practices

- Section 6.4 discusses the interface points across the bridge: spaces

- Section 6.5 considers the bridge as a whole: the strategy conveyance bridging process

- Section 6.6 summarizes this chapter.

Note: with the move now to a wholly theoretical discussion, forthwith the SGs and SMs will collectively be referred to as strategy practitioners.

6.2 Overview of the study

The decision to research the conveyance of strategy and the entangled dominant tensions that surface arose because of a personal desire to understand at a deeper level why conveyed strategy did not always result in the desired actions. Being an IT portfolio practitioner and collaborating with practice has been integral to this doctorate. An appraisal of the literature (Chapter 2) acted to sensitize me to the domains of SAP, Sensegiving/Sensemaking, and Organizational Paradox but also highlighted gaps in knowledge related to sociomateriality and discourse, the understanding of altering narratives and texts during strategy conveyance, and the links between SAP and Organizational Paradox during strategizing. With the starting questions and a sense of the literature, a constructionist grounded theory study was embarked upon using Charmaz (2006) methods.

The study aimed to develop a theoretical understanding of how tensions affected the sensegiving-sensemaking process during strategy conveyance. Data from a total of 24 interviews, observation of a 3-day strategy conveyance meeting, and 5 primary strategy conveyance texts were gathered and analyzed through theoretical sampling (Chapters 4-5). This resulted in the SCBP that presents an understanding of the practitioner sensegiving-sensemaking process during the process of strategy conveyance, which includes spaces, tensions, practices (strategy narratives, texts, and meetings), and time components (section 5.5).

The main objective of the discussion that follows is to look deeper in order to gain further insights that address my research questions (Suddaby, 2006; Charmaz, 2014), and as Charmaz (2014, p. 305) recommends, in keeping with the principles of a constructionist grounded theory, an important step is to locate the findings in relation to relevant theories "Through comparing other scholar's evidence and ideas with your grounded theory, you may show where and how their ideas illuminate your theoretical categories and how your theory extends, transcends, or challenges dominant ideas in your field.".

6.3 The cables and beams of the bridge: The Practices - Narratives, texts, and meetings

The cables and beams of a suspension bridge act to support the roadway across the bridge, with the cables held in a state of stress, while the beams are compressed. At the start of the study, I likened the narratives and texts of strategy conveyance to those cables and beams of a suspension bridge not expecting that this use of such a metaphorical analogy would develop into a foundational component of the study. The first study finding suggests that portfolio **strategy narratives and texts are carriers of tensions** through the language, lexicon, metaphors, and visuals used.

We know that "talk is consequential for constructing, making sense of, and communicating strategy. Words, in both their spoken and their materialized forms in text, are some of the most powerful resources for making and signifying an organization's strategy." (Balogun *et al.*, 2014, p. 175).

Narratives, both the creation and performance of, are said to have importance for strategy practice with narratives applied to both strategizing and to the codification of strategies (Brown and Thompson, 2013). Narratives evolve as strategy is crafted, and continue to evolve as the strategy is conveyed, in so doing the narrative becomes the carrier of the strategy which in turn aids the continuity of the contained strategy. Narratives maintain their importance through the unfolding of strategy as stories (Balogun *et al.*, 2014). Even back in the second half of the 1990's, in their discussion of the narrative turn, Barry and Elmes (1997) suggested that strategy was an influential story within organization, thus a form of narrative story-telling rich with sensemaking properties.

Language, a fundamental part of organizations, narratives, and strategy practices/processes, plays a constitutive role as well as being functional[24] (Paroutis, Heracleous and Angwin, 2013). In this constitutive role, with language becoming constitutive through the mechanisms of linguistic labels humans place on things and/or events, through directing practitioner attention in certain situations, and in helping to frame how an issue should be viewed (Paroutis, Heracleous and Angwin, 2013). For example, a sensemaking practitioner might question if an altering strategic direction being conveyed is relevant for the ongoing

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[24] The "functional view of language as simply transmitting clear unambiguous meanings, contained in words, from one person to another" Paroutis, S., Heracleous, I. and Angwin, D. (2013) *Practicing strategy: text and cases.* London: Sage Publications Ltd.

development of their portfolio of offerings? Language then matters in both a functional and constitutive way and is the basic building block of discourse both orally in narratives and written in texts. Language, however, does have its limitations because it can be ambiguous and open to interpretation in different contexts. As an example, the space: 'Locating context and talking with others' (section 5.3.1.2) combines context in both a sensegiver space and a sensemaker space of the same name. The context for the sensegiver space is the promotion of dialogue (Derksen *et al.*, 2019), while the context for sensemakers is one of talking with others so they can position themselves in relation to the strategy, i.e., helping the sensemaker 'belong'. This sense of 'belonging' though can be fraught with tensions for the sensemakers (Smith and Lewis, 2011). The sensemaker is trying to understand the potential adaptations and implications of change to both themselves, and their work actions, while also negotiating their individual identity versus the collective organization's goals.

Language is a core part of sensemaking (Weick, 2001; Whittle, Vaara and Maitlis, 2023), and "Sensemaking is, importantly, an issue of language, talk, and communication." (Weick, Sutcliffe and Obstfeld, 2005, p. 409). However, the literature on language in sensemaking is diverse and the roles and functions of language within sensemaking have yet to be theorized (Whittle, Vaara and Maitlis, 2023). While, Whittle, Vaara and Maitlis (2023, p. 1808) state that "we understand less how different forms of language work together to shape organizational sensemaking process as a whole.", they do suggest a theoretical framework for understanding language in organizational sensemaking. This theoretical framework (Whittle, Vaara and Maitlis, 2023, p. 1830) looks at how differing linguistic processes shape the construction of meaning in sensemaking through the integration of three ways to conceptualize language, i.e., a cognitive linguistic perspective, social practices of language use (including rhetorical, narrative, and interactionist), and a focus on discourse.

Narrative is an often-applied lens of SAP research (Fenton and Langley, 2011; Vaara and Reff Pedersen, 2013; Brown and Thompson, 2013), as is the sensegiving/sensemaking lens (Balogun and Johnson, 2004; Balogun and Johnson, 2005; Rouleau and Balogun, 2011; Kaplan and Orlikowski, 2013), and the interactionist approach (Vaara, 2003; Kwon, Clarke and Wodak, 2014). By comparing the resultant SCBP conceptual framework from this study with Whittle, Vaara and Maitlis (2023) theoretical framework, it's possible to see all three of these linguistic processes (1. Cognitive linguistic perspective, 2. A focus on social practices, and 3. A focus on discourse) in operation.

Firstly, the cognitive linguistic perspective (1) pivots around the use of language to reflect and shape practitioner mental structures through frames, concepts, and metaphors.

Interestingly, metaphors are a common occurrence within the SAP foundational texts and are said to relate to the metaphorical domains of "construction" and "system" (Rouleau, 2013, p. 555). As presented in chapter 5 (section 5.2.3.2, and 5.3.3), metaphors are rife within the narratives and texts of the strategy conveyance bridging process. The metaphors have been shown to be important in that they are guiding future sensemaker action, but also aiding meaning making by structuring the tensions within the conveyance spaces of the SCBP. Further, the metaphors intermingled/nested within the conveyance narratives and texts act as a vehicle for placing the tensions on stage within the conveyance spaces and lend characteristics to those spaces. The metaphorical language, within the researched study, built on the metaphors representing tensions in the texts, e.g., do more with less, and visuals, e.g., from->to etc., and acted as a medium for conveying more than the words said functionally (sections 5.2.3.3 and 5.3.3). Metaphors ultimately lend structure to the tensions within the organizational spaces of the strategy conveyance bridging process (section 5.2.3.2, Figure 5-5), with some of the presented tensions invoking emotional/cognitive responses (see Aligning and Ambiguity tensions within section 5.3.1.2). Language is also a useful indicator of salience, of tensions (Jarzabkowski, Lê and Bednarek, 2018), and as language transcends space and time (Waistell, 2006), so to can tensions.

The of the use of language in social practices (2), involves the various practices through which sense is made during actor interactions, whether through rhetoric, narrative, or interactionist approaches. In their discussion, Whittle, Vaara and Maitlis (2023) refer to the rhetorical approach as one often used by sensegivers when attempting to influence others sensemaking (Gioia and Chittipeddi, 1991; Maitlis and Lawrence, 2007). Even the lexicon employed within the language can elicit a positive or negative interpretation by sensemakers during conveyance (Bilgili *et al.*, 2017) because the spaces are fraught with unresolved tensions and the sensemakers purpose is to work through them. The spaces within this study bring together both sensegivers imparting the strategy, and sensemakers attempting to make sense of the changes being conveyed (chapter 5, section 5.3), i.e., the spaces act as containers of experience for the sensegiving-sensemaking exchanges and cycles over time (sub-section 5.3.7). The entire strategy conveyance bridging process is itself a sensegiving-sensemaking process.

"Narratives lie at the heart of sensemaking processes." (Whittle, Vaara and Maitlis, 2023, p. 1820), a good story can drive engagement and action (Weick, 2001), and "Language is the medium through which good stories are created" (Whittle, Vaara and Maitlis, 2023, p. 1820). Language, lexicon, metaphors, and stories are the foundational building blocks of narratives

and as previously presented (sub-section 5.2.3), narratives, along with texts (sub-section 5.2.4), act as the carriers of tensions, encompassed within those organizational spaces of the sensegiving-sensemaking process of conveyance.

The interactionist approach is said to "refer to approaches that analyze social interaction between two or more actors" (Whittle, Vaara and Maitlis, 2023, p. 1822), such as strategic decision making and strategic change, power and authority, or processes of interactions in work groups. The unit of analysis for this study is practices at the interface between the sensegivers and the sensemaking during interactions within the strategy conveyance process, and so, is also consistent with the interactionist approach to sensemaking.

Sensemaking is considered a narrative process (Weick, 1995) but also often looked at in the form of "discourses" (Gephart, 1984; Brown, 2000; Mueller and Whittle, 2011). We know that discourse (3), as a combination of linguistic and social practices, helps practitioners "to understand how discursive structures enable or constrain sensemaking and thereby reproduce or transform systems of thought" (Whittle, Vaara and Maitlis, 2023, p. 1807), but also that language as a component of sensemaking not only promotes cognitive processing but also can imbue transformative power into texts (Brown, 2000).

Now turning to texts, some researchers have begun to look at the role of texts in strategizing (Samra-Fredericks, 2003; Fenton and Langley, 2011), strategic plans as a directive genre and their characteristics (Vaara, Sorsa and Pälli, 2010), and as strategy tools that codify knowledge of strategy making, "often through some form of propositional or visual representation" (Jarzabkowski and Kaplan, 2015, p. 528). However, few studies have specifically examined the genre of IT portfolio strategy conveyance texts, and none linked them to the visual presentation of tensions.

PowerPoint presentations, as a genre of strategy conveyance texts can and often do, contain both words and visuals that exhibit a set of characteristics and rhetorical 'moves', in a similar vein to strategic plans as a genre (Cornut, Giroux and Langley, 2012). Strategy texts are said to "prompt meaning-making through the conversations they stimulate" (Knight, Paroutis and Heracleous, 2018, p. 894), and texts can enable practitioner thought by being both "retrospective and prospective" (Maybin, 2001). Visual materials have also been said to mediate strategy work by supporting sensegiving-sensemaking practices and communication (Garreau, Mouricou and Grimand, 2015), and artefacts/materials are made meaningful through social interaction such as strategizing (Dameron, Le and LeBaron, 2015). So, there is obvious value in examining strategy materials and in particular, visuals within PowerPoint texts to better understand the meaning they contain. Further, those material artefacts and

visuals contain metaphors, evidenced in chapter 5, sub-section 5.2.4.1, that convey a message both literally and figuratively (Proctor, Proctor and Papasolomou, 2005), so that the interpretation is open to creative insight, yet the source of a powerful metaphor can at the same time help the message resonate and be picked up and carried forward. The downside, however, is that material artefacts could be instead a source of ambiguity (sub-section 5.3.1.2) and potential stuckness (sub-section 5.3.1.6) if the way forward is not clear. Hence then the importance of repeated dialogue around the text in different spaces over time to increase clarity, crystallise a way forward that is aligned and prevent stuckness which could lead to no action. Additionally, the rhetorical moves identified within the genre of strategy conveyance texts (sub-section 5.2.4.1) can also act to reinforce messages during the texts use in spaces, though attention needs to be given to the completeness of the eleven rhetorical moves (Swales, 1990) if they are to aid clarity (sub-section 5.3.1.3).

The, Proctor, Proctor and Papasolomou (2005) article on visualizing the metaphor reported on their exploration of the use of metaphors in advertising which uses a heavy amount of visuals. Their findings suggest that visual metaphors and the accompanying messages are interpreted differently by individuals based on those "individual's perceptions, interests, experiences and motivations" (Proctor, Proctor and Papasolomou, 2005, p. 55), with the process of "Recognizing, assimilating and interpreting the metaphor" (Proctor, Proctor and Papasolomou, 2005, p. 55) being complex and dependent on an individual's experience and motivations. Metaphors/visual metaphors can also say what cannot be said in "fully literal and explicit terms" (Camp, 2006, p. 1), with metaphors enabling the 'jump' from sensemaking to meaning making (Dalton, 2021). In the words of Tsoukas (1991, p. 571), "through metaphors I can say what cannot be said in literal language, thus expressing an emotional reality lying beyond even conscious awareness".

Metaphors may also have the property to encompass both poles in a tension in a non-confrontational way (McKenzie and van Winkelen, 2009), though we still know little of how tensions emerge and become salient within and through this genre of strategy conveyances texts. This lack of knowledge is a critical gap given the pivotal role of strategy conveyance documents in IT service companies today. As Vaara, Sorsa and Pälli (2010, p. 686) emphasize, "strategy texts are not mere documents representing specific ideas, but that strategy texts have force potential (Fairclough, 1992) and textual agency (Cooren, 2004).". I.e., strategy documents serve multiple purposes. The discursive practices in strategizing are important for legitimizing organizational change (Hardy, Palmer and Phillips, 2000; Vaara, Kleymann and Seristö, 2004), strategic documents can influence what is considered strategic

e.g., in accounting practices (Ezzamel and Willmott, 2008), and micro-level conversations and rhetoric are often considered as managerial sensegiving when referring to strategy (Balogun *et al.*, 2014), constitute everyday strategizing (Samra-Fredericks, 2003); these studies provide insights that help improve understanding of the discursive nature of strategy texts and strategizing, they do little to shed light on the tensions inherent within a specific genre of strategy texts, i.e., those that are used by IT portfolio practitioners for the conveyance of strategy that affect what service offerings are sustained and/or created. I argue that there is little research into the form this genre of texts take, other than the examination of Microsoft PowerPoint presentations by Kaplan (2011), or the language, lexicon, and metaphors applied within this genre.

Innovation narratives, which could be argued are strategic for an organization attempting to grow/succeed, translate ideas across organizations (Bartel and Garud, 2009). Metaphors in particular are transformative and aid sensemaking (Balogun *et al.,* 2014). Metaphors, by acting as a bridge, carrying over meaning from the source to target destinations (Gozzi, 1999). Discourse within organizations, via the application of narratives, texts, practices, symbols and metaphors is "both socially constituted and socially constructive as it produces objects of knowledge, social identities and relationships" (Hardy, Palmer and Phillips, 2000, p. 1231). Discursive narratives, texts, metaphors, language, and practices, etc., are all core to the 'doing of strategy' (Whittington, 2006; Jarzabkowski and Spee, 2009) but there is limited research regarding how these narratives and texts present and carry the tensions in the process of strategy conveyance. An argument could then be made, that by increasing strategy practitioner awareness of how narratives and texts carry tensions is a way to improve strategy practitioner praxis. Likewise, sensemaking about paradoxes in relation to organizational change, and in particular sensegivers influence on sensemakers understanding of the associated tensions, is also an under explored area (Sparr, 2018).

IT Portfolio practitioners when viewed as strategists i.e., those wider practitioners that contribute to the execution and achievement of the studied organizational strategic goals (Weiser, Jarzabkowski and Laamanen, 2020), as they create new and maintain previously released go-to-market service offerings that generate revenue for the organization, then these practitioners are not top/senior executives but are middle managers and below. These strategy practitioners then as middle managers or hold less senior positions, are having to manage strategic contradictions and tensions in their daily work, i.e., "The management of paradoxes is now more than ever the function and duty of strategy practitioners (Smith and Tushman, 2005)" cited in Dameron and Torset (2014, p. 292).

In the SAP positioned research by Dameron and Torset (2014) on the tensions that emerge from strategists' discourses on strategizing work, they argued that a discourse-based representation of strategizing work highlighted a paradox lens on strategy as "paradoxes are constructed through communicative actions" (Dameron and Torset, 2014, p. 293). Those same communicative actions of course are predicated on the use of talk and texts to convey strategic direction, support the sensegiving-sensemaking process and driving resulting action.

As the data shows (Chapter 5), the portfolio practitioners of this study are dealing with not just the macro-tensions of ambidexterity paradox (Andriopoulos and Lewis, 2009) but also a myriad of micro-practice tensions (Jarzabkowski, Balogun and Seidl, 2007). Numerous studies have examined how practitioners respond to tensions (Andriopoulos and Lewis, 2009; Jay, 2013; Jarzabkowski, Lê and Van de Ven, 2013; Jarzabkowski and Lê, 2017; Jarzabkowski *et al.*, 2022) but gaps in knowledge still remain, particularly at the level of middle management (Rouleau, 2005) and below.

Organizational paradoxes involve tensions that must be handled interdependently to sustain long term performance (Smith and Lewis, 2011). Yet as Knight and Paroutis (2017, pp. 404, emphasis in original) suggest little is still known about "the early stages of how paradoxical tensions *become salient*" for practitioners. As the data indicates, salience in SAP tensions emerge over time through spaces that allow for different types of conversation to help practitioners get to grips with the implications of apparently contradictory demands. The macro tensions involved a myriad of micro practice tensions that need addressing to move forward on the macro level tensions and trigger action – i.e., move from space one (Direction – having a path to follow) to space four (Understanding made, and validating) and onwards to space five, Acting. The sensegiving practitioners recognized that a level of repetition was necessary in progressive spaces for the sensemakers to develop understanding (sub-section 5.3.1), and that the evidence from the spaces suggest that reflection is also important (sub-section 5.3.1.3: Making connections and thinking through implications). Those same sensegiving practitioners also showed recognition of the tensions (sub-section 5.3.1.2) even if they didn't address them explicitly in the conveyance process which could be explained by how practitioners experience and apprehend the mindset stages (socialized, self-authoring, self-transforming) of institutional contradictions (Voronov and Yorks, 2015) Also Miron-Spektor *et al.* (2018) suggest that different individuals approach tensions in various ways. The level of an individual's ability to demonstrate a paradox mindset "the extent to which one is accepting of and energized by tensions" (Miron-Spektor *et al.*, 2018, p. 26) can also help

them perform and innovate, suggesting that the sensegiving leaders in this study have developed the skill of a paradox mindset that shapes the way they make sense of tensions (Weick, 1995; Luscher and Lewis, 2008).

Given this research study examined the conveyance of strategy process, which should be considered an early, foundational step towards the implementation of an organization's strategy, Finding 1 and its associated data (presented in Chapter 5, section 5.2) has generated additional understanding of how narratives and texts contribute via the combined use of language, lexicon, metaphors, visual diagrams, and meetings to the early exposure of tensions for practitioners, albeit with the specific focus on this researched organization over a defined timeframe. Tensions that the portfolio practitioners as both sensegivers and sensemakers recognize as relevant to their daily practices have been shown by this research to exist within both the narratives and texts examined (section 5.2). Narratives and texts alone, however, are only part of the portfolio strategy conveyance process. The sensemaking practitioners only become aware of the strategy narratives and texts when the sensegiving practitioners invoked activities such as staff meetings, extended leaders-calls, or one-to-one meetings, where they (the sensegivers) present and encourage discussion on, the topic of strategy in relation to the evolution of the portfolio of offerings. Collectively the combination of mediating practices (narratives, texts, and socializing activities) act as the mechanism of conveyance. Thus, one mediator alone may not be enough, but the three together surface tensions and re-enforce the conveyed message.

The combination of narratives, texts, and meetings as the collective practices of the strategy conveyance process enable both verbal and visual tensions for the portfolio practitioners participating in the portfolio work of the studied organization. Conveyance of portfolio strategy is considered a practice under the Johnson *et al.* (2007) definition just as much as the tools and techniques of strategizing such as strategic analysis or board meetings in the wider context of strategy praxis.

Strategy practices can also be conceptualized as "mediators within an activity system. They mediate between any given subject group, their focal community and the strategy activity in which the community is engaged." (Jarzabkowski, 2011, p. 133). The combination of narratives, texts, and meeting activities as practices, help practitioners 'do' strategy (praxis (Whittington, 2006; Johnson *et al.*, 2007)) by making connections in what might be called a performative routine, i.e., "specific actions, by specific people, at specific times and places, that bring the routine to life." (Feldman and Pentland, 2003, p. 94). If the collective of narratives, texts, and meeting activities is a performative 'routine', how then does it help

practitioners apprehend the tensions, work through the implications for praxis, or use the routine as a source of creative development?

Tensions begin their journey to salience for the sensemakers i.e., become noticeable, when those tensions are written/visualized in texts, and talked into existence via narratives. The paradox literature suggests that responses to paradox through practitioner's rhetoric and cognition (Smith and Lewis, 2011; Lewis and Smith, 2014) are important. "Strategy work involves talk in all its forms" (Balogun *et al.*, 2014, p. 175) with the practices of discourse (via narrative, rhetoric, conversation, and metaphors) being consequential for conveying and making sense of strategy. Knight and Paroutis (2017) also tell us that material artefacts constitute structural conditions for rendering paradoxical tensions salient when higher-level leaders used strategy documents to act as cues to prime contexts for lower-level managers sensemaking. Material artefacts are tangible 'things', have a level of durability and travel in the same form, whereas words alter. Scholars also identify that material artefacts support the Learning::Performing paradox by playing multiple roles and render paradox salient for practitioners via triggering, supporting, disconnecting, and connecting practitioner sensemaking (Aoki, 2020).

Narratives and texts then, unless heard/seen by the portfolio practitioners through some conveyance activity e.g., a meeting, an email, a presentation, a conversation etc., cannot (applying the metaphor of performance) step onto the stage, leaving tensions waiting in the wings for their moment to shine. As Schad and Bansal (2018, p. 1493) highlight studies describing the empirical qualities of tensions (Andriopoulos and Lewis, 2009; Jarzabkowski, Lê and Van de Ven, 2013; Sheep, Fairhurst and Khazanchi, 2017) rather than their underlying causes, implies that "if tensions are not perceived, they are not important." Yet that ignores tensions when they are latent and nested and also neglects their complex interconnections.

By bringing conveyance focused narratives, texts, and activities such as meetings together in enacted practices, the practices give tensions a vehicle to step onto the stage and become spotlighted in the spaces discussed in the following section (6.4). This focus on practices also furthers SAP research by "revitalizing our field by deepening our understanding of the relationship between practice research and strategic organization" as called for by (Rouleau and Cloutier, 2022, p. 1).

6.3.1 Proposition-1

Based on the evaluation of finding 1 above, the following proposition is made:

- The combination of narratives, texts, and discursive activity involving the metaphorical representation of tensions, supports the translation of abstract strategy into praxis.

6.4 The points along the bridge: The Spaces

Continuing with the metaphor of a suspension bridge, the roadway across the bridge allows the movement of people and vehicles from one anchored point to another in a progression of traffic that is always entering the bridge, on the bridge or exiting the bridge, i.e., a state of now (point in time), behind (past time) and ahead (future time). There are places along the bridge where signage sits (material artifacts of language and visuals), cars may pass (moving in a direction) or even stop if traffic builds, or an accident occurs (tensions). The collective of roadway, people, vehicles, signage, and tensions can be said to be a form of interactive spaces as people and vehicles experience the journey and flow across the bridge. The second study finding suggests that **for both the sensegivers and sensemakers, tensions become relevant throughout the conveyance of strategy in a series of interrelated and evolving flexible 'containers of experience' (organizationally constructed spaces) over time**.

Strategy-as-practice emphasizes that practitioners 'do strategy with things' e.g., artefacts such strategy documents (Kaplan, 2011; Vaara and Whittington, 2012), strategy tools (Jarzabkowski and Kaplan, 2015), bodily performances, or spatial arrangements (Jarzabkowski, Burke and Spee, 2015). Jarzabkowski, Burke and Spee (2015, p. S27) in their study of material, spatial and bodily aspects of strategic work related to financial trading suggest that "spaces are consequential for the types of strategic work performed". Also, several researchers have suggested that giving more attention to how practitioners at all levels of a firm and not just top leaders (Rouleau and Balogun, 2011) engage with the spatial and material aspects of their everyday 'doing' would move the SAP body of knowledge forward. We know that the intersection or nexus of praxis, practices, and practitioners (A, B, C in Figure 2-1) is the 'locational occurrence' of strategizing i.e., where strategizing happens (Jarzabkowski, Balogun and Seidl, 2007), and in a study that observed physical episodes of strategizing between a re-insurer and a broker, Jarzabkowski, Burke and Spee (2015, p.

S30) found that "different types of activity were performed in different types of space". While Ropo and Höykinpuro (2017, p. 357), when exploring the narrative nature of organizational '(work)spaces', state that "Instead of being a passive object, spaces become active and performative through human engagement". I'd argue that parallels could be drawn with Jarzabkowski, Burke and Spee (2015) findings and Ropo and Höykinpuro (2017) suggestions when examining the evidence from the research presented within this thesis, in that the conveyance spaces are joint sensegiving/sensemaking practice spaces and that the tensions arising relate to conveyance spaces (Chapter 5, section 5.3). Tensions once noticed by the sensemakers, via the narration and presentation by sensegivers in meetings, become important as they are experienced. The tensions become fully salient to the sensemakers through the concepts of plurality, change, scarcity, and cognition (as evidenced in Chapter 5, Table 5.7), and as an output of this study, within and across the spaces in which they are surfaced and experienced. Spaces do help though with the different interdependencies between the overarching paradox of continuity and change and the micro level paradoxes that can get in the way, e.g., ambiguity and clarity, or risk and speed, or authority and responsibility. Additionally, when looking at the tensions emergent within the spaces (section 5.3), its apparent that sensegivers convey the tensions tacitly and explicitly as part of their praxis, while working through the tensions is the praxis of the sensemaking practitioners.

Within the spaces of the strategy conveyance process, and in particular the space: Making connections and thinking (sub-section 5.3.1.3) which is full of both individual reflection with some reflexivity, and a space for organizational learning (Vince, 2002), the need for practitioners to reflect is highlighted. Reflection after all is part of the learning process (Kolb, 1984) that supports conceptualization, before action, and Luscher and Lewis (2008), in their research with senior teams, talk about reflection as being important for working through tensions, while Putnam, Fairhurst and Banghart (2016, p. 72) say "Oppositional tendencies brought into recognition through reflection or interaction (Ford & Backoff, 1988; Smith & Tushman, 2005)". Reflection is key to changing action and to practice-based learning but is often avoided (Hibbert *et al.*, 2019), however this research has un-covered a set of attributes per space (section 5.3) which includes reflection that those practitioners acting as sensegivers should exhibit and/or practice (summarized in Table 7.2). These sensegiver attributes help to characterize and facilitate each space and should be considered as part of the practice kitbag for strategists "in getting strategizing done" (Whittington *et al.*, 2006, p. 615). As Hibbert *et al.* (2019, p. 190) say, reflexive practices can help individuals to recognize their responsibility, that is "to see themselves as agents and as authors of the organizations and institutions in which they live". Further, reflection and reflexive practices

are said to be important for understanding and attaining knowledge, i.e., "within the realm of practical knowing, where knowing is always incomplete and where reflexive attentiveness to unfolding contextual dynamic is central to both understanding and action" (Coghlan, 2011, p. 61), yet despite the calls of Jarzabkowski and Wilson (2006) and Splitter and Seidl (2011) for more practical and actionable knowledge in the SAP domain, there is very little written about the value of reflection in the SAP literature. As Splitter and Seidl (2011, p. 99) state, "despite the explicit concern for practical relevance, there are hardly any systematic epistemological reflections on the conditions and possibilities of generating practically relevant knowledge through this approach in the practice-based literature (with the notable exception of a small study by Jarzabkowski & Wilson, 2006)". So, maybe the topic of reflection is an area for further research in the SAP arena.

In their review of the studies that casts "space as a process" Stephenson *et al.* (2020, p. 797), suggest that the theoretical treatment of space is both enabling and constraining of actions, rather than a stable container. Further there is a need to "examine the material aspects of space in conjunction with the ongoing activities, practices, and work relationships of organizational processes." and importantly investigate space "as a changing and evolving process." (Stephenson *et al.*, 2020, p. 798).

Putnam, Fairhurst and Banghart (2016, p. 67) argue that a process lens "shifts the locus of paradox and contradiction to discourses, social interaction processes, practices, and organizational activities rather than actors' cognitions or large-scale systems.". They suggest that together discourse, developmental action, prevailing socio-historical conditions, plurality and praxis are constitutive of tensions, dialectics and paradoxes (Putnam, Fairhurst and Banghart, 2016). In this study organizational space is the 'place' where such ingredients combine and, where tensions become apparent and are experienced. This is consistent with Stephenson *et al.* (2020) call for a process perspective for examining space dynamically – "in terms of movement, activity, events, change, and temporal evolution (Langley, 2007: 271)" cited Stephenson *et al.* (2020, p. 802), and with Jarzabkowski, Lê and Bednarek (2018) call to study paradox as process and practice. If then, the constructs of movement, boundary, assemblage, and scaling (previously discussed in Chapter 5, sub-section 5.3.6) are essential for exploring how space aids organizing as Stephenson *et al.* (2020) suggest, then this study offers something novel by way of presenting how the conveyance of strategy process unfolds over time through a series of inter-related and flexible spaces. The spaces act to assemble practitioners, practices, and tensions and exhibit flexible boundaries plus instil movement in a sequenced flow. There is also some flexibility as to the way the spaces evolve and overlap to

keep the flow going. Each conveyance space is 'marked' by characteristics of time (Table 5-13), types of metaphors (5-9), and a set of tensions (Table 5-11) that surface within, and thus bound that space, or collective spaces where tensional 'pairs' extend across two conveyance spaces.

The spaces of the strategy conveyance process act then as flexible containers of evolving experience where the social process of conveying strategy creates and render tensions salient for practitioners. These spaces of the conveyance process bring together practitioners, their praxis, and their daily practices "built on and modified by the dynamic interaction between human activity and non-human elements" (Moura and Bispo, 2020). Therefore, I argue that the resulting strategy conveyance bridging process is a case example (Yin, 2009) of the actions and interactions of a tension laden socio-material (Moura and Bispo, 2020) organizing process.

6.4.1 Proposition-2

Based on the evaluation of finding 2 above, the following proposition is made:

- Different types of space for conveying strategy evolve to enable strategy practitioners to progressively make sense of the tensions that are salient for their daily practice and help them work through stages of understanding so that they can work out how to integrate current and future praxis.

6.5 The bridge as a whole: The Strategy Conveyance Bridging Process

A bridge is built with the purpose of providing passage of humans and vehicles across something difficult to otherwise traverse. The bridge is a collection of component parts, cables, beams, roadway, signage etc., that facilitates human action, i.e., the carrying over and enabling a change from one place to another.

Sensegiving-sensemaking is an ongoing, interpretive and processual phenomenon (Weick, 2012) that supports continuity and facilitates change, and when examining strategy conveyance, is one that is influenced by practices and materiality (Orlikowski and Scott, 2015; Jansson *et al.*, 2020). When practitioners, their praxis, and practices, via those narratives, texts, and activities (Jarzabkowski and Seidl, 2008; Fenton and Langley, 2011;

Jarzabkowski, Spee and Smets, 2013), become entangled in spaces over time, the apprehension of tensions and paradoxes is seen to be inherent in the process of strategy conveyance. Although the dominant tensions uncovered within this study utilize language specific to the researched company, the nature of the tensions is pervasive for many companies. Tensions such as those of continuity and change (Jarzabkowski, 2003), exploitation and exploration (Andriopoulos and Lewis, 2009; Raisch *et al.*, 2009), and efficiency and effectiveness (Smith and Tushman, 2005; Cunha *et al.*, 2019), which are in essence the tensions uncovered during this research, e.g., do more with less, grow and hold (sub-section 5.3.1.1), and move from -> to (sub-section 5.3.1.5), are all socially constructed at the collective practitioner level, and easy to articulate in the strategy documents through language, visuals and metaphors, compared to the interpretational constructivist tensions, which are more locally pertinent, e.g., ambiguity-clarity (sub-sections 5.3.1.2 and 5.3.1.3), responsibility versus authority (sub-section 5.3.1.4), and risk versus speed (sub-section 5.3.1.4).

This study revealed a complex mosaic that ultimately required the examination of the integrated conveyance process rather than just the piece parts. The conveyance of portfolio strategy for IT service companies such as NewCo is foundational to enabling portfolio development practitioners, those sensemaking Offering Managers, to understand the strategic direction, make sense of the conveyed strategy in relation to their portfolio of go-to-market offerings, and then engage in the meaning-making necessary to implement the actions which execute on the conveyed strategy.

This study's academic context sits squarely in the domain of Strategy as Practice (SAP) research as its about what practitioners 'do' (Jarzabkowski, Balogun and Seidl, 2007). It was conducted during what Jarzabkowski, Seidl and Balogun (2022) call the SAP 'harvesting' period of 2016-2021 that is "characterized by *agenda-confirming* work" (Jarzabkowski, Seidl and Balogun, 2022, pp. 75, emphasis in original) and the SAP literature had reached a degree of maturity. During this harvesting phase scholars could take for granted the concepts involved in SAP and began to use those concepts instead to shine a light on what was happening in the complex phenomenon of doing strategy within organizations and beyond. I.e., harvest the results of this alternative conceptualization of strategy.

This study goes beyond just the SAP orientated phenomena by considering broader issues of how practitioners convey and enact strategy in an IT Portfolio context, and also applies several themes recognized as central to the SAP bodies of literature, namely a sensemaking (and sensegiving) approach (Balogun and Johnson, 2004; Rouleau, 2005; Rouleau and

Balogun, 2011; Maitlis and Christianson, 2014), a discursive approach in relation to the use of narratives (talk) and texts (Barry and Elmes, 1997; Samra-Fredericks, 2003), and that of sociomateriality i.e., the interplay between material objects e.g., PowerPoints, and social activity in organizations (Kaplan, 2011; Balogun *et al.*, 2014). Further, this research and the resulting SCBP answers the call of Jarzabkowski, Kavas and Krull (2021, p. 7) for "SAP scholars to decide what practices, by which actors, to follow, being open to the patterns that emerge from these practices and drawing on their immersive experiences of the field (Watson, 2011) to define these patterns as strategic.". While, in their recent publication Kohtamäki *et al.* (2022) point to opportunities for connecting streams of SAP research, particularly research at the intersections of e.g., Sociomaterial and discourse to name but one, and, Kohtamäki *et al.* (2022, p. 226) add that their analysis has identified gaps in the clusters of existing SAP research which could add further to the understanding of strategy research.

The results of this study I'd also argue goes some way towards addressing this call to look at the intersections of broader research (Jarzabkowski, Seidl and Balogun, 2022; Kohtamäki *et al.*, 2022) by illustrating an intersection of the SAP, Organizational Space, and Organizational Paradox research domains and, offers up an early view of a framework focused on how conveyance of IT portfolio strategy unfolds over time.

6.5.1 Proposition-3

Based on the evaluation of finding 3 above, the following proposition is made:

- A pattern of tensions moves from conceptual organizational paradoxes inherent in all major strategic change through micro level interpretational tensions, in order to evolve a collective sense of the opportunity space for addressing the organizational paradoxes and moving from the current organizational state to a strategically relevant organizational future.

6.6 Summary Chapter 6

In this chapter, the results of the data analysis and findings presented in Chapter 5 were positioned according to related theories and literature. This chapter presented the Strategy Conveyance Bridging Process which seeks to explain how tensions influence IT strategy conveyance between leaders as sensegivers and managers as sensemakers.

The chapter that follows will discuss the contributions of this study to knowledge and practice, evaluates the quality and limitations of the research, makes suggestions for future research, and draws the thesis to a close with reflections on the doctoral journey.

7 Contributions, future work, and reflections

"The single biggest problem in communication is the illusion that it has taken place." -
George Bernard Shaw.

7.1 Introduction

This thesis has explored how the tensions present in an organization conveying strategy help or hinder the sensegiving/sensemaking of strategizing practitioners, and how and when those tensions become salient and are experienced by the strategy practitioners.

An overview description of this thesis is as follows.

- Chapter 1: this chapter explains the organizational context for this research and discusses the site where the research was conducted. This chapter then sets the scene for the remaining chapters of the thesis through defining the purpose of the study and the structure adopted for the remainder of the thesis.

- Chapters 2 to 6: the remaining chapters of the thesis report on the process adopted to conduct the longitudinal, interpretive research into the conveyance of strategy over time, and develop the research findings. The chapters discuss the following areas:

  - Chapter 2: the sensitizing literature,

  - Chapter 3: the research design,

  - Chapter 4: the application of Grounded Theory Method,

  - Chapter 5: the findings of the research and the development of a conceptual framework, the Strategy Conveyance Bridging Process (SCBP),

  - Chapter 6: the theoretical discussion.

This chapter concludes the thesis and discusses the following:

- The research achievement of the research purpose, question, and objectives (section 7.2),

- Summary of findings and propositions (section 7.3),

- The contributions to theory and practice (section 7.4),

- The limitations of the research (section 7.5),

- Evaluation of the research (section 7.6),

- The areas where further research is required (section 7.7),

- Reflections of the doctoral journey (section 7.8),

- The conclusions drawn from this research study (section 7.9).

This thesis has been concerned with research into strategy conveyance and has explored the defined research aim, and questions and objectives were addressed. The contributions made by this research are three-fold:

1. Three findings in relation to the conveyance of strategy process that highlight a series of related sensegiving-sensemaking spaces each with specific tensions relevant to the contextual spaces within which they emerge. These spaces are necessary to allow the practitioners to work out how to deal with the tensions they encounter through the conveyance process. The tensions within each space are enabled via practices, i.e., the combination of narratives, texts, and meetings, that render the tensions salient for the practitioners. Metaphors used within both the strategy conveyance narratives and texts structured the tensions in a way that makes those tensions salient for the practitioners.

2. The process associated with the conveyance of strategy, i.e., The Strategy Conveyance Bridging Process (SCBP) as a conceptual framework,

3. An early glimpse of an intersecting relationship that requires further research, between the domains of SAP, Organizational Paradox and Organizational Space and supported by three propositions.

7.2 Achievement of research purpose, question, and objectives

The purpose of this study was to uncover understanding about why the conveyance of strategy is problematic in practice, by understanding how tensions of continuity and change manifest and are dealt with at the micro level during the conveyance process. Further, understanding how tensions affect the conveyance process between sensegivers and sensemakers and how are those tensions are experienced was of interest. This research purpose is expressed in further detail via the research questions (one primary and two secondary):

- *"How do tensions influence IT strategy conveyance between leaders as sensegivers and managers as sensemakers?"*

- *"How, and when, are tensions conveyed through the medium of narratives and texts?"*

- *"How are tensions experienced and become salient for sensegiving leaders and sensemaking managers?"*

Three research objectives were defined to help structure my thinking through the research process.

These objectives have been achieved through conducting longitudinal, interpretive research into strategy conveyance and developing the Strategy Conveyance Bridging Process conceptual framework. The chapters within this thesis that explain the achievement of these objectives are shown in Table 7.1. The references to the relevant sections of the thesis identify the research conducted in support of the research questions and objectives.

Research question and sub-questions	Research objective	Relevant chapters and sections
How, and when, are tensions conveyed through the medium of narratives and texts?	RO2: To uncover how the strategy conveyance narratives and texts express tensions to better understand how those	Chapter 5: section 5.2 Chapter 6:

	tensions affect the conveyance process.	section 6.3
How are tensions experienced and become salient for sensegiving leaders and sensemaking managers?	RO1: To explore what happens around the narratives and texts in terms of the rhythm and process of communication and, what the narratives and texts contain in terms of metaphors. RO3: Explain where strategy conveyance tensions appear and how and why they become salient to portfolio development practitioners.	Chapter 5: section 5.3 Chapter 6: section 6.4
How do tensions influence the strategy conveyance process for sensegivers and sensemakers?	RO1-RO3: In combination answer the primary research question.	Chapter 5: section 5.4 Chapter 6: section: 6.5

Table 7-1: Achievement of research questions and research objectives within this thesis

7.3 Summary of findings and propositions

This research resulted in the articulation of three primary findings, one secondary finding, and three theoretical propositions.

7.3.1 Primary findings

Finding 1: Narratives and texts are carriers of tensions - The tensions of strategy conveyance are inherent within the language, lexicon, and metaphors used in both the sensegiver narratives and texts (both stated and implied) throughout the conveyance practices. Further, the metaphors utilized structured the tensions in a way that makes those

tensions salient thus allowing the sensemakers to notice the implications to themselves and their work.

Finding 2: Conveyance spaces as containers of experience - For both the sensegivers and sensemakers, tensions become relevant throughout the conveyance of strategy in a series of interrelated and evolving flexible 'containers of experience' (organizationally constructed spaces) over time.

Finding 3: Strategy conveyance as a bridging process – The strategy conveyance bridging process is made up of a series of distinct but inter-related organizational spaces that evolve over time. Each space acts as a container of experience, rich with both verbal and visual tensions that are enabled by practitioner practices. The meetings, narratives, and texts of the practitioner practices render the tensions salient and relevant for both sensegivers and sensemakers.

7.3.2 Secondary finding

Finding 1a: IT Portfolio strategy conveyance texts contribute towards a unique genre with a distinct set of rhetorical moves and associated features. The predominant vehicle for the presentation of these texts is that of Microsoft PowerPoint presentations which, as visual artefacts, open the possibility of more creative interpretation of strategy and allow for continuity and change as fast-moving industries strategies evolve annually.

7.3.3 Propositions

1. The combination of narratives, texts, and discursive activity involving the metaphorical representation of tensions, supports the translation of abstract strategy into praxis.

2. Different types of space for conveying strategy evolve to enable strategy practitioners to progressively make sense of the tensions that are salient for their daily practice and help them work through stages of understanding so that they can work out how to integrate current and future praxis.

3. A pattern of tensions moves from conceptual organizational paradoxes inherent in all major strategic change through micro level interpretational tensions, in order to evolve a collective sense of the opportunity space for addressing the organizational paradoxes and moving from the current organizational state to a strategically relevant organizational future.

7.4 The key contributions of this research

7.4.1 The SCBP conceptual framework as a unique contribution to knowledge

The purpose of this study was to theorise about the conveyance of strategy through narratives and texts in the context of rapidly changing IT portfolios - supported by a conceptual framework and propositions. The result shows how during the cycles of conveyance tensions were experienced, and then became salient for the portfolio practitioners as sensegivers and sensemakers. To answer these questions, I used grounded theory methodology and a set of methods in the form of participatory interviews, ethnographic observations with field notes, and primary strategy texts, to collect data in an organization which given my position offered me a privileged insiders' perspective on the workings of strategizing practice.

The intertwined iterative process of data gathering, and analysis led to an understanding that the doing of strategy conveyance (praxis) effectively involves five components prior to any action – Narratives, texts, spaces, tensions, and time. These operate in tandem to bridge gaps in understanding between SGs and SMs so that progressively they can make sense of the conflicting priorities inherent in any move from what exists to a new future and work through the tensions that emerge.

Chapter 6 has identified that there is a breadth and depth of literature supporting the SCBP. Some literature has already identified at a high-level some of the concepts within the SCBP as being important, such as materials in the 'doing' of strategy, but the SCBP conceptual framework remains a unique and useful contribution to knowledge for the following reasons:

1. This is the first study to focus on the conveyance of strategy *as a process* within the context of IT services, and to explore how tensions influence sensegiving-sensemaking interactions.

2. The SCBP conceptual framework provides the first framework (Figure 7.1) to represent the process of strategy conveyance and how the different components of narratives, texts, metaphors, meetings, spaces, and tensions coalesced around the experiences of the practitioners which unfolded over time.

3. The SCBP conceptual framework to combine multiple components of strategy conveyance, i.e., sensegivers, sensemakers, narratives, texts, meetings, spaces,

tensions, metaphors, and time, that articulates how, and when, tensions are experienced and become relevant for sensegiving/sensemaking practitioners.

4. The SCBP illustrates how each conveyance space is 'marked' by a set of tensions and types of metaphors that surface within and thus bound that space, or collective spaces where tensional 'pairs' extend across two conveyance spaces.

5. The SCBP surfaced a set of sensegiver attributes associated with each conveyance space which are important for practice (sub-section 7.4.2, Table 7-2).

Spaces

Direction –
having a path to follow

Practices
(Narratives, Texts, and Meetings)

Locating context and talking with others

Practices
(Narratives, Texts, and Meetings)

Making connections, thinking

Practices
(Narratives, Texts, and Meetings)

Understanding (made) and validating

Practices
(Narratives, Texts, and Meetings)

Acting

Practices
(Narratives, Texts, and Meetings)

Time

Do more with less
Grow and hold

Aligning
Ambiguity

Market changed, go faster
Needing Clarity

Risk v speed
Authority v responsibility
Interlock

Move from -> To

Tensions

Key:
- *Assemblage*: the fluid and changing configurations of practitioners, praxis, and practices
- *Boundaries*: the evolving physical, mental and/or social demarcations of the sensegiving and sensemaking practitioners
- *Practices*: the combination of narratives, texts and meetings that activate tensions within organizational spaces
- *Movement*: the ongoing actions, drivers, direction, flow, journey and connections through the conveyance process
- *Spaces*: the 'containers of experience'
- *Tensions*: the challenges, issues, problems, dialectics, and paradox etc. experienced within the organizational spaces
- *Time*: the objective and subjective perceived/experienced by practitioners through the unfolding of the conveyance process

Chapter 5, section reminder:
- Practices – section 5.2
- Spaces – section 5.3
- Tensions – section 5.3.2
- Assemblage, Boundaries, and Movement – section 5.3.7
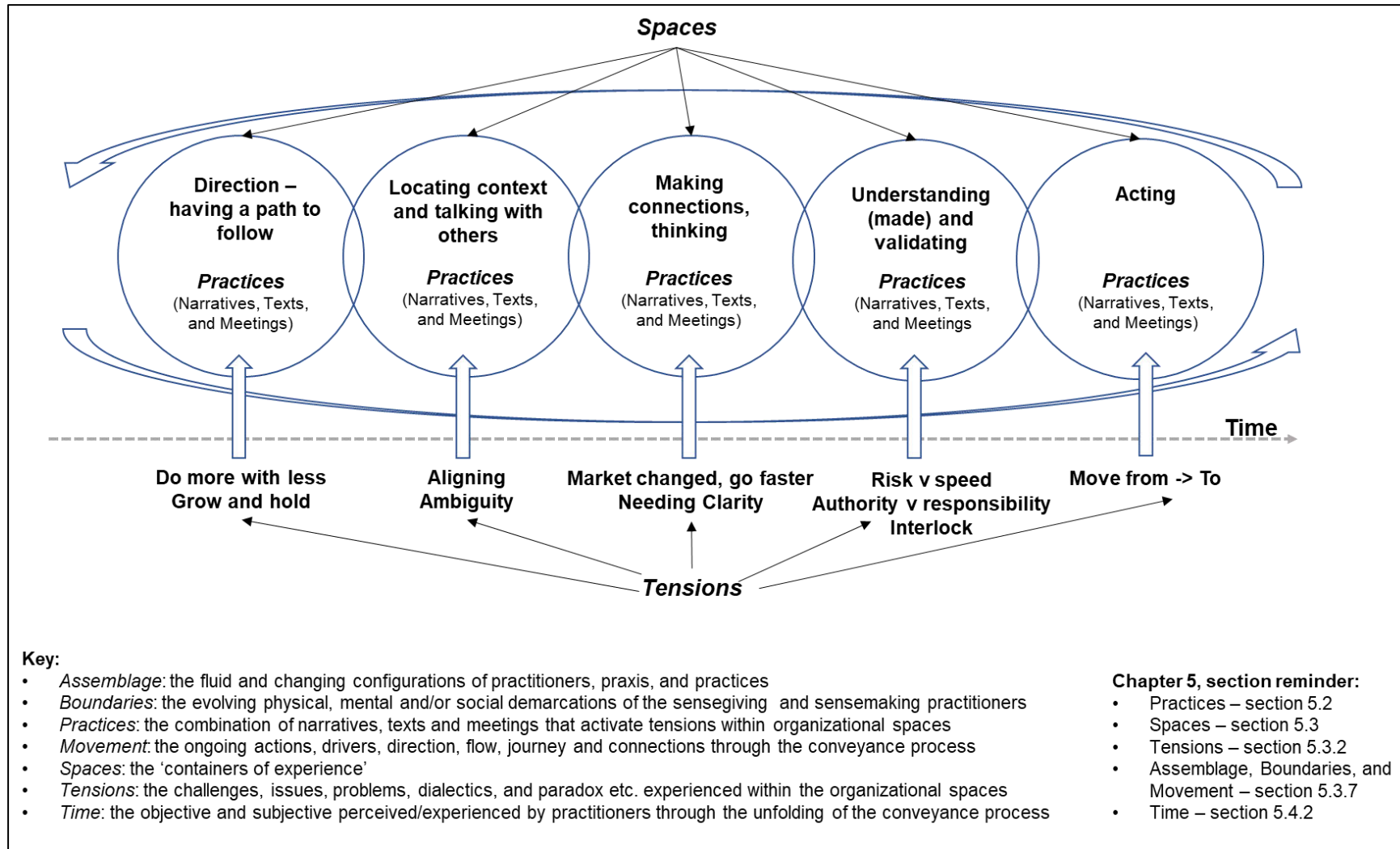- Time – section 5.4.2

Figure 7-1: Contribution to knowledge: A Conceptual framework: The Strategy Conveyance Bridging Process (SCBP)

7.4.2 Contributions to practice

The grounded theory offers a conceptual framework for practice and enlightens the process of strategy conveyance, the dominant tensions that arise during strategy conveyance and sensegiving attributes pertinent to those practitioners' conveying strategy.

This study had several implications for IT services practitioners in portfolio management. Firstly, the study provides insights into the overall organizational process of strategy conveyance. The process identifies a sequence of five inter-related organizational spaces that are jointly inhabited by the sensegiving leaders and sensemaking Offering Managers. Supporting the conveyance process are a set of practices in the form of narratives, texts, and meeting activities, that collectively surface sets of tensions, during the conveyance process over time. Each conveyance space has a set of characteristics, tensions, metaphors, and sensegiving attributes to be cognizant of (summarized in Table 7-2), e.g.,

Space 1: Directing (Direction, having a path to follow)

The first space is initiated by the practitioner conveying the strategy i.e., the sensegiver and is characterised by transference i.e., presentation of the strategy, using narratives and texts, and the path to the future, and translation i.e., beginning to set the stage for transformation and/or change. Within this space there are types of tensions and metaphors to be aware of, e.g., the tensions of contradictory requirements e.g., do more with less, and ontological metaphors such as progress, driving movement, and/or analogies of complex system to plants. The types of attributes the conveying practitioners should exhibit in this space are those of **promoting sensemakers to ask questions** and being **observant to the use of language and metaphors that may cause confusion**.

Space 2: Locating (Locating context and talking with others)

The second space is conversation and 'talk' heavy and characterized by its iterative nature as cycles of questioning is promoted and/or occurs. This is the space where those practitioners who are on the receiving end of the conveyed strategy attempt to rationalize what they have seen in the texts and heard from the narratives and begin to figure out how the strategy affects them as individuals and their work, and ultimately 'where' they belong considering the conveyed strategy. Within this space emotional/cognitive tensions surface, such as ambiguity and power, and a mixture of orientational and ontological metaphors arise such as up/down, light to dark, good/bad, and seeing/knowing. The types of attributes a conveying practitioner should exhibit in this space are the **promotion of dialogue**, a **tolerance for ambiguity**, **exhibit patience** with the sensemaking-practitioners, **anticipate**

the types of questions and concerns the sense-making practitioners may raise, and importantly **allow enough time for the back and forth of questions and answers**.

Space 3: Connecting (Making connections and thinking)

The nature of the third space is one of individual **reflection and reflexivity** where practitioners need time to process and reflect on the implications of the conveyed strategy so they can make connections and understand the inter-relationships. It's a space less about the narratives and texts of the conveyed strategy and more about thinking. Within this space tensions arise such as those based on external pressures for internal change (market, financial, sustainability, governmental, environmental etc.) and tensions of learning (learning versus performance, and past to future skills, practices, tooling etc.). Further orientational and ontological metaphors also occur in this 'connecting' space, e.g., light to dark, good/bad, and seeing/knowing, changes in movement. Attributes the conveying practitioners need to practice in this space are continued **anticipation** of and time necessary for further sensemaker questions and concerns, which should be thought through using **reflective/reflexive practices**. Practitioners playing the role of strategy conveyance sensegiver should also **recognize that they themselves will at times oscillation between a sensegiver and sensemaker state** as they refine their understanding, and these sensegivers will also need to act as guiding **coach** to the sensemakers in this space.

Space 4: Validating (Understanding made and validating)

Space four is the organizing space where practitioners ready themselves for action after gaining understanding. This is a space where sensemaker-practitioners validate their understanding with the sensegiving-practitioners so they can plan their next steps and activities. Within this space organizing tensions surface such as risk versus speed, control versus authority and agreeing the plan and actions with others (interlocking). The type of metaphors that occur in the 'organizing' space are structural in nature, with metaphors drawing analogies with physical structures such as building, and speed of action as motion forward. Sensegiving leaders in this space will need to continue to guide, but also **lead by example at times**, practice appropriate **delegation** (e.g., of authority, power etc.), and actively **take decisions** when necessary to help the sensemaking-practitioners move to the 'acting'/execution space.

Space 5: Acting

Space five, 'Acting' is the performing space where actions occur to put into practice the conveyed strategy, i.e., execute activities to realise the strategy. The tensions to be aware of

in this space are those where practitioners are asked or perceive that there are multiple competing priorities in play. Ontological metaphors such as 'action is motion' will appear in this space. The 'acting' space is more the home of the sensemaking-practitioners performing actions with no sensegiving leader attributes yet defined due to the limited scope of the research conducted to date.

In summary, the strategy conveyance bridging process provides a way for Portfolio management leaders to see what aspects of the framework they already use, which types of tensions occur within the defined spaces, and at points in time through the conveyance process. By doing so portfolio leaders will be more able to prepare potential answers and mitigation scenarios prior to conveying the portfolio strategy, and to think thoughtfully about the language, lexicon, and metaphors to apply in both the conveyance narratives and supporting texts (words and pictures) to lessen ambiguity and improve the sensemaking of those they convey strategy to in future. Using the SCBP framework could be a way for leaders to reflect upon and analyse their strategy conveyance to identify what might be improved or altered.

Strategy Conveyance Space	Characteristic of space	Examples of types of tensions	Metaphors to be aware of	Sensegiver attributes to be practiced / exhibited
Directing	Transference and Translation	Tensions of contradictory requirements: - Do more with less - Do this and that	Ontological: - Progress is motion - Changes are movement - Complex systems as plants (grow/reduce)	- Promotion of questioning - Observant to use of language and metaphors that may cause confusion
Locating	Iterative	Emotional / cognitive responses to tensions: - Ambiguity and clarity - Belonging - Power	Orientational & Ontological: - More is up / Less is down - Movement from light to dark, or good to bad - Knowing is seeing / Seeing makes knowing possible	- Promotion of dialogue - Exhibit patience - Allow time (for back and forth) - Tolerance for ambiguity - Anticipation
Connecting	Reflective	External pressure for internal change: - Markets, Industry, Financial, Environmental Tensions of learning:	Orientational & Ontological: - Knowing is seeing / Seeing makes knowing possible - Movement from light to dark, or good to bad	- Oscillation between sensegiver and sensemaker state - Enabling time for reflection - Reflexive thinking - Allowing time for further questions - Coaching - Anticipation

		- Learning versus performance - Past and future	- Progress is motion - Changes are movement	
Validating	Organizing	Tensions of organizing (for action): - Risk versus speed - Authority versus responsibility	Structural: - Complex systems are buildings - Speed of action is speed of motion	- Decision making - Leading by example - Delegation
Acting	Performing	Tensions of performance: - Multiple and/or competing priorities	Ontological: - Action is motion	Requires further research to uncover the sensegiver attributes of this space.

Table 7-2: Sensegiver attributes to be practiced, by space, types of tensions, and metaphors

16

7.4.3 Summary of contributions

In summary, this study has contributed to theoretical knowledge and practice. This research begins to show where and how the extension of the SAP domain by illustrating the links between SAP, Organizational Paradox, Organizational Space, and Time. A conceptual framework, the SCBP, illustrates how strategy conveyance is an entanglement of space, sensemaking, and tensions, over time.

This research has also uncovered attributes/skills practitioners should exhibit and/or practice when conveying strategy.

7.5 Evaluation of research

Now that the research has been completed, I return to the evaluation of the research methodology. Tables 4-9 and 4-10 in Chapter 4 presented the steps that were taken to enhance the quality of this study during the initial conceptualization of the research topic and questions, and later through the iterations of data gathering and analysis. These steps were based on the criteria for evaluating constructionist grounded theory studies, recommended by Charmaz (2014) and Birks and Mills (2015). I again use those same criteria below for the evaluation of the conceptual categories and resultant constructed grounded theory (Tables 7-2, 7-3), and then expand further based on Charmaz (2006).

It is recommended that as Tables 7-3 and 7-4 include only the evaluation of the final analysis, they are read in conjunction with Tables 4-9 and 4-10 (Chapter 4, section 4.11) for a fully rounded evaluation of the quality of this study.

Evaluation criteria	Measures taken
Credibility	The categories and theoretical arguments are firmly rooted in the data and can be traced back through the levels of coding and analysis (section 4.10)
Originality	The categories constructed are grounded in the data, are unique to this study and offer new insights to the topic under exploration. The analysis offers new conceptual understanding of the data. The theoretical and for practice significance of this study is discussed (see sub-sections 7.4.1 and 7.4.2).

	The constructed conceptual grounded theory (the SCBP) is located within the existing literature (sections 7.3, 7.4, 7.5). A sense of originality is discussed in the multiple sets of tensions, the associated metaphors, and the sensegiver attributes arising within the five conveyance spaces.
Resonance	The constructed categories and the final grounded theory in the form of the Strategy Conveyance Business Process Framework were shared with some of the conversational partners and were found to resonate with their experience in the explored area and offer deeper insights of their practice. The SCBP theory adds to the existing SAP body of knowledge, revealing connections between SAP, Materiality, Sensegiving/Sensemaking, Organizational Space, and Organizational Paradox.
Usefulness	The analysis offers interpretations of IT portfolio management practitioner practice that can be used by strategy conveying professionals in their everyday practice. The final grounded theory identifies areas for further research, as discussed in section 7.7.

Table 7-3: Measures taken to enhance the quality of the study based on Charmaz's (2014) evaluation criteria (2).

Evaluation criteria	Measures taken
Researcher expertise	My insider researcher bias, and the limitations to the study have been acknowledged throughout the thesis and in sub-sections 4.2.1, and sections 4.8, 4.9 and 7.6.
Methodological congruence	Constructionist grounded theory was discussed (Chapter 3) to be suitable for the purposes of the exploration of strategy conveyance and the uncovering of when and how tensions became relevant and salient for sensegivers/sensemakers. The outcomes of the analysis and the constructed conceptual grounded theory meet the purposes of the study and the research objectives presented in Chapter 1.

	A conceptual grounded theory is presented as the resultant product of the research findings detailed in Chapter 5.
Procedural precision	The resultant grounded theory is credible and made sense to the conversational partners who participated in the study, and to my university supervisors it was presented to.

Table 7-4: Measures taken to enhance the quality of the study based on Birks and Mills' (2015) evaluation criteria (2).

7.5.1.1 Credibility

Firstly, Charmaz (2006) proposed that credibility is concerned with whether the results of a study are plausible in terms of closeness and presentation of the data, the process of analysis and the evidence supporting the claims made. I have attempted throughout the research process to be thoughtful, rigorous, and transparent. From the start of this research journey, I laid out my table stating that the area of research was of immense interest to me both personally as a portfolio management strategist and as a nascent academic.

The research has explored the conveyance of IT portfolio strategy practices from the perspective of the conveying portfolio leaders as sensegivers and the sensemaking portfolio offering managers engaged with the conveyance practices/process. Analysis of interviews with conversational partners and their narratives, the primary strategy texts used in conveyance, and my own observations in the field meant I was exceptionally close to the practices/process under study. Consistent with a constructionist GTM approach, I acknowledge that the result of this research is not the ultimate truth per se, but is qualified and mediated by my own interpretations and abductive reasoning (Charmaz, 2014).

In the introductory chapter I located myself in the study and placed my research in the wider context (Chapter 1: Introduction). My choice of constructionist grounded theory methodology (section 3.5) also sought to assist with this transparency, as did my discussion on my insider researcher status and the approach I took to lessen my biases (sub-section 4.2.1, and sections 4.8, and 4.9). I clearly outline my own ontological and epistemological stance and how I viewed my relationship with the study (Chapter 3: Methodology).

The grounded theory process followed both in the methods of data gathering and analysis is clearly articulated (Chapter 4: Methods). The development of codes and categories has been explained and evidenced using quotes from CPs, observational field notes, and examples

illustrated (both words and visuals) from primary strategy texts. Relationships between codes and categories were presented and discussed, with visual representations used to illustrate these connections and the evolving study narrative via the visual metaphor of the suspension bridge. My findings show a detailed and in-depth familiarity with the data (Chapter 5: Findings).

7.5.1.2 Originality

Next, Charmaz (2006) suggests that the focus on 'originality' is related to whether the categories presented are fresh and offer new and/or interesting insights into the area of study. Further, originality looks at the social and theoretical significance of the work and whether the grounded theory challenges, extends or refines current concepts and practices. Originality also relates to theorizing that is advanced. The intent of the discussion chapter (Chapter 6) is to give credibility to the findings (Chapter 5) and lend plausibility of the results for the fit with existing theory, or lack of. In doing so, this locates the advances for both the SAP and sensemaking literature.

As outlined in the contributions earlier (sub-sections 7.4.1 and 7.4.2), this research is original in that the categories and theoretical framework presented offer new insights. For example, the organizational spaces of the conveyance process bring together strategizing portfolio practitioners, tensions, practices via narratives, texts, and meeting activities, and time, that are flexible carriers of sensegiving-sensemaking experience, but also have boundaries and are assembled in a way not previously highlighted (Chapter 5: Findings). The types of tensions and metaphors arising in each conveyance space offer unique insights to the progressive process of strategy conveyance, and a set of sensegiver attributes have also been presented (Chapter 5: Findings). Many of the categories presented are innovative and suggest fresh perspectives to inform the findings and our knowledge of an early component of the overall strategy implementation process.

This study adds to the body of works that already exist within the fields of SAP, Organizational Paradox, and Organizational Space, and specifically focuses on connecting these streams of research to further extend the SAP corpus (Kohtamäki *et al.*, 2022).

7.5.1.3 Resonance

The criterion of resonance deals with whether the categories I have presented portray the extent of the studied experience, whether taken for granted meanings have been exposed and finally whether the grounded theory makes sense to the participants who shared their

knowledge and experiences throughout the study. The analysis of the data highlighted the collective experiences of the conversational partners and my voice (as insider-researcher/practitioner) and offers a deeper understanding of the IT services portfolio management world by conceptualizing the conveyance of strategy bridging practices and how the spaces of conveyance bring to life tensions through the practitioner narratives and texts, thus contributing to knowledge. Through regular checking back with the CPs, they were able to reflect, revisit, and give input and validation to the insights I was drawing throughout the analysis phases (Chapter 5: Findings).

7.5.1.4 Usefulness

Finally, Charmaz (2006) advocates that 'usefulness' relates to what from the study interpretations practitioners can use in their everyday lives, whether the analysis exposes potential further research and finally, how the research contributes to the wider body of knowledge. I believe the theoretical findings are useful for several reasons. They offer a new way to consider how tensions become salient to portfolio practitioners, how the language, lexicon, and metaphors used within narratives and texts act as carriers of tensions. Those same narratives and texts when coupled with meeting activities give those tensions and metaphors 'time to shine' in a series of inter-related organization spaces that evolve over time. Additionally, a set of sensegiver attributes that should be practiced and/or exhibited by those conveying sensegiving-leaders surfaced within each space and should be considered important in practice. Collectively these findings and the conveyance of strategy bridging process offers a platform to develop these findings further.

I argue that this GTM study exhibits the criteria of credibility, originality, resonance, and usefulness, however, there are always limitations of any study.

7.6 Study Limitations

As with any qualitative study several limitations exist, though the limitations do not reduce the study's findings and implications but can be viewed as constraints that present future opportunities for greater research.

While this study was exploratory in nature, attempting to uncover how tensions of the strategy conveyance process were experienced and became relevant for the strategy practitioners, the GTM methodology was potentially the biggest limitation of this study. Ultimately a methodology is only as good as the researcher employing it, and while I invested significant effort to achieve theoretical sensitivity through reading in numerous fields, I

acknowledge that as an insider practitioner and nascent researcher, the breadth, depth and understanding of multiple theoretical codes may have been limited or even unintentionally biased.

The nature of GTM requires a highly iterative, and emergent process, which at a certain point, 'time had to be called' for reasons of progress, participant availability, and funding etc. An example of this would be further exploration of the space: Acting, which may uncover additional knowledge for example that connects the SCBP theorizing to the implementation of strategy.

The portfolio strategy conveyance bridging process conceptualizes one cyclic pattern of practitioner practices in pursuit of their organizations' goals, and of course these practitioners are likely involved in other processes that would also warrant further examination to give even more depth to the SCBP, e.g., How are the OMs onward conveying to other practitioners outside the portfolio team such as Marketing or the Delivery teams responsible for marketing the offering or instantiating the technology and technology processes in support of the offering. There are also limitations in the transferability of the tensions that were constitutive of the spaces due to the single site of study, however, the findings add a rich understanding of how tensions become salient for sensemakers within the organizational spaces used in the strategy conveyance process, and, how such insights may provoke future research.

Further limitations exist, firstly, the study was limited to a discrete number of SG and SMs in one business unit focused on portfolio offering development within a large enterprise IT company (NewCo). This discrete set of SG and SMs was chosen due to the unfettered access I, as the researching practitioner, had open access to as an insider-researcher and active practitioner. However, this focus was warranted given what I aimed to understand, i.e., during the conveyance of strategy process (through narratives and texts) how and when tensions arose and then how did those tensions affect the sensegiving/sensemaking of the portfolio offering development practitioners. As a result, the study does not examine the tensions arising in the whole of the NewCo organization's portfolio development group, but rather only those tensions perceived by the practitioners from the Cloud and Platform Services portfolio development business unit, though interestingly these tensions can be generically framed in the context of ongoing change.

Secondly, this study is limited by the number of participatory conversational partners. While 7 SGs and 17 SMs were enough to achieve saturation for the purposes of this study, further research is required before being confident that the nascent theory proposed could apply to

other IT Services portfolio management organizations during the conveyance of strategy practices.

Thirdly, the study participants were all from a Western background and as such further research could be undertaken with participants from different cultural backgrounds.

Forth, there are limitations relating to the researcher. I, as an insider researcher, found it challenging to be simultaneously 'inside' and 'outside' the field of study. I was highly appreciative of the openness my conversational partners throughout the interview process, and of the leadership support I received in relation to access to primary documents and the ability to observe at meetings. I tried hard to leave 'myself' at the door so to speak when analysing the data and was conscious of bringing in my personal biases throughout the study journey. However, I always strove to faithfully represent and present the conversation partners views and responses in a fair and open manner. The early point at which saturation was achieved and the grounding of the categories I put down to the uniformity of SG and SM responses and the checking back with the CPs both to confirm what I'd heard/seen, but also to uncover resonance within the SCBP.

7.7 Suggestions for future research

To address the limitations of this study outlined above (section 7.6), the first recommendation is that this study should be replicated in other IT Services portfolio management organizations and secondly, with an increased number of participatory conversational partners. Replicating the study in this way would allow further testing of the proposed conceptual framework for credibility and usefulness, uncover additional tensions, and add further depth to the framework. The third recommendation is that the tensions that were constitutive of the spaces in the SCBP are examined in other IT portfolio strategizing praxis to move the conceptual framework towards a more transferable theoretical framework.

Fourth, the role of metaphors and visuals in strategizing tensions should be further examined, as should the role of reflective spaces as a pivotal move in aligning the strategizing process <u>before</u> organizing and acting. Fifth, the study could also be replicated in other industries to gauge the frameworks applicability / transferability outside the IT Services industry, and finally, rerunning this study by a non-insider researcher would I'm sure add insights I failed to grasp/uncover due to my insider researcher status and potentially eliminate any unconscious bias I brought to the research process.

7.8 Reflections of the doctoral journey

I began this study from the viewpoint of a strategy practitioner who wanted to know more about how the conveyance of portfolio strategy influenced those portfolio practitioners involved in creating and maintaining go to market services offerings, and what it was that affected the organizational adoption (or not) of the strategies that I and others worked so hard to craft and convey (in words and pictures). Once my nascent researcher journey began, I knew early on that grounded theory method was going to be my route, I felt it in my bones even though my supervisors encouraged me to 'try on' other methodologies first. In the end I plucked up the courage and started down the path of the constructionist form of GTM, and although it has been a hard and at time frustrating path to follow, I've made it through to what I believe is a truthful execution of the method, allowing concepts to emerge at each stage.

Looking back, I realise now I had certain practitioner assumptions e.g., we just don't communicate well enough, or the presentation decks we use just don't hit the mark, but this research process has made me understand there's so much more in play that affects the telling and presentation of strategy, and the ultimate sensemaking of the portfolio practitioners so implementation can occur. I knew tensions, those everyday challenges we practitioner's face of not enough time, always too much to do, and never enough resources available would raise their heads, but I wasn't ready for the fact that these tensions surfaced in a structured flow enabled by language and metaphors that I took for granted and, within previously unarticulated organizational spaces that coalesced around the experiences of the practitioners which unfolded over time.

I have throughout this thesis included my reflections and I hope you will agree now almost at the end of your reading, that I have been both reflective and reflexive and presented a study that has aimed at being an "interpretive, open, language-sensitive, identity-conscious, historical, political, local, non-authoritative and textually aware understanding of the subject matter" (Alvesson and Deetz, 2000, p. 113).

7.9 Final conclusions

The purpose of this study was to explore and develop theory, supported by a conceptual framework, regarding how the conveyance of IT portfolio strategy (via narratives and texts) occurred, the tensions that arose during cycles of conveyance, and how those tensions were experienced, and then became salient for the portfolio practitioners (sensegivers and sensemakers). To answer these questions, I used grounded theory methodology and a set

of methods (Participatory interviews, ethnographic observations with field notes, and primary strategy texts) to collect data in an organization I (previously) worked for and then analysed using constructionist consistent methods.

The results of the study produced three findings plus one supplemental finding (sub-sections 7.3.1, 7.3.2), three theoretical propositions (sub-section 7.3.3) and a theorized process, the Strategy Conveyance Bridging Process (SCBP), that integrates a progression of organizational spaces, practices (as a combination of narratives, texts, and meeting activities), sensegiving-sensemaking, and tensions, overtime (section 7.4). A contribution in the form of sensegiving attributes/skills practitioners conveying strategy should exhibit/practice has also been presented (section 7.5). The intent is that the findings, propositions and the SCBP conceptual framework will provide a basis for further theoretical advancement in the fields of SAP, Organizational Space and Organizational Paradox, and for the improvement of IT portfolio management practitioners in their daily practice.

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Appendices

Appendix-A: Request for Participation, Iteration-1

From: Keyse, Jay
Sent: Wednesday, March 05, 2014, 5:19 PM
To: <xxxx>
Subject: Requesting your participation in an Academic Research Project

Dear < xxxx>,

As you are aware I'm carrying out a research project on the communication of strategy via narratives and texts on the sensemaking outcomes of offering management practitioners and this research forms part of my joint Masters/Doctoral (MSc/DBA) academic qualification at Henley Business School, University of Reading, U.K.

My research project investigates whether an organisation such as a large IT Outsourcing Services company can convey enough understanding of its strategies to allow the offering management practitioners to better execute against those strategies, in order to drive outcomes supporting growth.

The aim of this Pilot Research Study is to explore what the desired actions are of the implementing offering management practitioners and to capture a detailed set of expected outcomes from the imparted strategies in order to fill out a rich contextual backdrop prior to commencing the main Doctoral research project.

Part of the research involves interviewing people who are directly involved with the communication and execution of Portfolio Strategies with direct knowledge of the desired outcomes of the organizationally communicated strategies and for this reason, I would like to invite you to take part.

If you agree, I will ask you to participate in two interviews each of about 60 minutes in length.

During the interview I will ask you questions on such topics as:

- Your opinion of the desired outcomes of the communicated strategies

- Your expectations of the resulting offering management staff actions that will achieve the needed outcome of growth

- What attributes or components you consider to be important when communicating strategies either through narratives (e.g., Town Hall sessions) or texts (e.g., MS PowerPoint strategy slides)

- Whether you believe that the current mechanisms used to communicate the strategies result in enough depth of understanding across the Offering Management community and why (or why not)

- What you consider drives the needed level of understanding in communicating the strategies

You can choose not to answer any particular questions and you are free to withdraw from the study at any time.

With your permission, I would like to record the interview and take notes for later analysis; these interview recordings will then be transcribed verbatim, and I will return a copy to you for you to read, edit should you wish to and then confirm before further analysis of the data occurs. The data will be held securely at all times and destroyed after the completion of the Doctoral project.

At every stage your identity will remain confidential. Your name and identifying information will not be included in the final report, and the identity of your organisation will also not be included in the final report.

A copy of the completed summary of findings will be available on request.

The project has been subject to ethical review in accordance with the procedures specified by the University of Reading Research Ethics Committee and AcquireCo Ethics Policy and has been given a favourable ethical opinion for conduct. Permission has also been sought and received from my organizational VP and AcquireCo General Legal Counsel.

If you have any further questions about the project, please feel free to contact me by email, and, if you agree to take part, I would be grateful for an email to confirm that you are aged 18

years or over and willing to participate on the basis of the arrangements described in this email as they relate to the nature of the project and your participation.

Kind Regards,

Jay

Jay Keyse,

Henley Business School Research Associate,

University of Reading, UK

/ Mobile

/ PC Phone

gf706535@reading.ac.uk / Henley Email

Appendix-B: Research Information Sheet

<u>Research Information sheet</u>

Study: Exploring how the conveyance of strategy via narratives and texts, influences the bridging process between sense-givers and sense-makers of offering management practitioners

This research project investigates whether an organisation such as a large IT Outsourcing Services company can communicate enough understanding of its strategies. In so doing, allowing the offering management practitioners to better execute against those strategies in order to drive outcomes supporting growth.

The aim of the Doctoral Research Study is to explore what the actions are of the implementing offering management practitioners as a result of conveyed strategic directions.

The research forms part of my Doctoral Degree (DBA) academic qualification at the Henley Business School, University of Reading, U.K.

Part of the research involves interviewing people who are directly involved with the execution of Portfolio Strategies through Offering Management and development, for this reason, I would like to invite you to take part.

If you agree, you will be asked to participate in two interviews each of about 60 minutes in length.

During the interview I will ask you questions on such topics as:

- Your opinion of the CPI communicated strategies

- What attributes or components you consider to be important to you in your role when receiving communicated strategies either through narratives (e.g., Town Hall sessions) or texts (e.g., MS PowerPoint strategy slides)

- Whether you believe that the current mechanisms used to communicate the strategies result in enough depth of understanding across the Offering Management community and why (or why not)

- What you consider helps your understanding in communicated strategies

- What actions you may take as a result of a communicated direction within CPI

You can choose not to answer any particular questions and you are free to withdraw from the study at any time.

With your permission, I would like to record the interview and take notes for later analysis. The data will be kept securely and destroyed after the completion of the project. No interview data will be shared with you Manager or Practice Leadership. At every stage your identity will remain confidential. Your name and identifying information will not be included in the final report.

The identity of your organisation will not be included in the final report.

A copy of the completed summary of findings will be available on request.

The project has been subject to ethical review in accordance with the procedures specified by the University of Reading Research Ethics Committee and has been given a favourable ethical opinion for conduct.

If you have any further questions about the project, please feel free to contact me at the email address below.

Name of researcher: Jay Keyse, Henley Business School Research Associate

Email address: j.m.keyse@programme-member.henley.com

Mobile No:

Appendix-C: Research Consent Form

Henley Business School
UNIVERSITY OF READING

Research Consent form

Study: Exploring how the conveyance of strategy via narratives and texts, influences the bridging process between sense-givers and sense-makers of offering management practitioners

I have read the information (previously p*rovided as part of the 'Requesting your participation in doctoral research interviews' email*) relating to the project and any questions have been answered to my satisfaction.

I agree to the arrangements described in the participation request/information email insofar as they relate to my participation.

I understand that my participation is entirely voluntary and that I may withdraw from the project at any time.

I agree to the interview being *audio recorded*.

I have received a copy of this consent form and of the accompanying participation request/information email.

I am aged 18 or older.

Name of participant: …………………………………

Signed: …………………………………………………

Date: …………………………………………………

Contact details of Researcher:

Jay Keyse, Henley Business School Research Associate

Email:

Mobile:

Appendix-D: Iteration-1 Sensegiver Interview Guide

20th March 2014

Sensegiver interview guide

Opening/Introduction

- Please tell me about the organization you work within

- Please explain your role within the organization

Context Setting

- What methods or processes are used to formulate Offering strategies?

- What methods or processes are used to communicate the resultant offering strategies?

- In your experience, what is it that works or does not work in the processes?

Communicated strategies

- Please share with me an example of the process by which you make sense of strategy information shared with yourself.

- What is it about the way in which our organization communicates strategy that helps or hinders your understanding?

- Thinking about the way in which our portfolio organization communicates strategy today (for example, virtual Town Hall meetings and MS PowerPoint decks) do you have a sense as to whether these mechanisms allowed the recipients to align their actions to the intended strategies?

- What are your expectations of your offering management staff action-wise as a result of the communicated strategies?

Attributes and components that makes a strategy resonate

- What key attributes or components do you consider to be important when communicating strategies either through narratives or texts?

- Can you give me an idea of whether you feel that strategies are only acted upon when the narratives are reinforced by visual texts?

Story-telling

- What do you think is the effect of 'telling a good story' on the communication of offering strategies?   Why,… tell me more?

- Looking at this recent document would you talk me through how the visual component helped you make sense of the information in relation to your daily practices?

- Can you share with me an example of when a strategy was conveyed through the means of a metaphor or analogy?

  - How did that affect your understanding and what resultant meaning did it bring to you?

………………………………….

Clean Language prompts:

What kind of X (is that X)?

Is there anything else about X?

Anything else?

Tell me more?

Is there a relationship between X and Y?

When X, what happens to Y

What happens next?

What needs to happen for X?

…………………………………

Appendix-E: Iteration 4a (Sensegivers) and Iteration 4b (Sensemakers) request for participation

Email Subject: Requesting your participation in doctoral research interviews

Dear <name>,

As you are aware, I'm carrying out a research project on: Exploring how the conveyance of strategy via narratives and texts, influences the bridging process between sense-givers and sense-makers of offering management practitioners**, and this research forms part of my Doctoral (DBA) academic qualification at Henley Business School, University of Reading, U.K.**

(https://www.henley.ac.uk/postgraduate-research/course/doctor-of-business-administration/)

This research project investigates whether an organization such as a large IT Outsourcing Services company can communicate enough understanding of its strategies. In so doing, allowing the offering management practitioners to better execute against those strategies in order to drive outcomes supporting growth.

The aim of the Doctoral Research Study is to explore what the influences are on the strategy conveyance process and the actions of the implementing offering management practitioners as a result of conveyed strategic directions.

Part of the research involves interviewing people who are directly involved with the execution of Portfolio Strategies through Offering Management and development, for this reason, I would like to invite you to take part in this data gathering phase.

If you agree, you will be asked to participate in two interviews each of about 45-60 minutes in length.

During the interview I will ask you questions on such topics as:

- When you receive Cloud, Platforms, and ITO (CPI) strategic communications, whether by email, Extended Leaders calls, staff calls, video, or PowerPoint decks etc., what do you do with the communication?
- What changes do you consider making to your actions in light of the messages and direction given in the communications?
- What is it about the accompanying presentation material (if anything) that helps or hinders you in understanding the strategic messages conveyed?
- What 'space' (mental, physical, other…) do you attempt to create for yourself to aid understanding and help you internalize the CPI strategic direction?

You can choose not to answer any particular questions and you are free to withdraw from the study at any time.

With your permission, I would like to record the interview and take notes for later analysis. The data will be kept securely and destroyed after the completion of the project.

No interview data will be shared with you Manager or NewCo Leadership. At every stage your identity will remain confidential. Your name and identifying information will not be included in the final report.

The identity of your organisation will also not be included in the final report, and a copy of the completed summary of academic findings will be available on request.

The project has been subject to ethical review in accordance with the procedures specified by the University of Reading Research Ethics Committee and has been given a favourable ethical opinion for conduct.

If you have any further questions about the project, please feel free to contact me by email, and, if you agree to take part, I would be grateful for an email to confirm that you are willing to participate on the basis of the arrangements described in this email as they relate to the nature of the project and your participation.

 Thanks in advance and kind regards,

 Jay

Name of researcher: Jay Keyse, Henley Business School Research Associate

Email address: **j.m.keyse@programme-member.henley.com**

Mobile No:

Date: 28th August 2017

Appendix-F: Iteration-4a Sense-giver interview guide

Sense-giver Interview Guide

<u>Sensegiver as a Sensemaker:</u>

- How have you attempted to understand the changes in the CPI (Cloud, Platforms, and ITO) strategic direction during the last 6-12 months?

- What 'space' (mental, physical, other…) do you attempt to create for yourself to aid understanding and help you internalize the CPI strategic direction?

- We often talk about the terms 'aligning and interlock' within CPI (e.g., think about the Roadmap PoR/PoI process). What do these terms evoke for you and how do you consider they aid understanding?

<u>As a Sensegiver:</u>

- Given the constant change climate we are operating in, how have you altered (if at all) the way you communicate CPI's direction and its remit to your staff?

- How do the textural materials (e.g., RISE deck, CPI IRB Strategy decks, Roadmaps etc.) help you communicate the strategic direction?

- What is it about/within the textural materials that aid you in the conveyance process?

<u>Bridging practices:</u>

- How do you try to help your staff understand the direction you want them to head?

- What 'space' do you attempt to create for your staff to understand and internalize the CPI strategic direction?

- For you, what part does time play in the process of understanding when you communicate CPI direction to your staff?

<u>Uncovering paradox:</u>

- What conflicts do you feel are hindering you and your staff's ability to understand and then execute the daily tasks that align to CPI's strategic direction?

- And, in reverse, what (if any) positives do you consider are helping you and your staff with reaching understanding and driving actions?

- Which of these tensions have become heightened over the last 12 months?

- Why those in particular?

Appendix-G: Iteration-4b Sensemaker interview guide

Interview Guide: Sensemakers (21ˢᵗ August 2017)

<u>As a Sensemaker:</u>

- When you receive Cloud, Platforms, and ITO (CPI) strategic communications, whether by email, Extended Leaders calls, video or PowerPoint decks etc., what do you do with the communication?
    - What changes do you consider making to your actions in light of the messages and direction given in the communications?
    - What is it about the accompanying presentation material (if anything) that helps or hinders you in understanding the strategic messages conveyed?
- What 'space' (mental, physical, other…) do you attempt to create for yourself to aid understanding and help you internalize the CPI strategic direction?
- We often talk about the terms 'aligning and interlock' within CPI (e.g., think about the Roadmap PoR/PoI process). What do these terms evoke for you and how do you consider they aid your understanding?

<u>Bridging practices:</u> - Thinking about the last Leaders communication you received/attended:

- What did you take away from the communication you felt was particular to you in your role (if anything)?
- What questions did that communication raise for you in relation to how you perform your daily role and tasks?
- If you talked with your leader/other staff about any of the communications, how does that help you make sense of the CPI Portfolio directions conveyed?

<u>Uncovering paradox:</u>

- What conflicts do you feel are hindering your ability to understand and then execute the daily tasks that align to CPI's strategic direction?
- And, in reverse, what (if any) positives do you consider are helping you with reaching understanding and driving actions?
- Which of these tensions have become heightened for you over the last 12 months?
- Why those in particular?

Appendix-H: Request for consent to conduct observations (Iteration-2)

Henley Business School
UNIVERSITY OF READING

Research Consent form: Observations

Doctoral (DBA) Research Study: Exploring how the conveyance of strategy, via narratives and texts, influences the bridging process between sense-givers and sense-makers.

1. I have read and had explained to me by **Jay Keyse** the introductory research observation request email relating to the project and any questions have been answered to my satisfaction.

I agree to the arrangements described in the introductory participation email insofar as they relate to meeting observations that I hold.

I understand that my agreement to allow research observations of my meetings is entirely voluntary and that I may withdraw my consent for observations to be conducted in relation to the defined DBA study at any time.

I agree to the meetings being observed, researcher field notes taken, and meeting documents made available for research analysis.

I have received a copy of this consent form and of the accompanying introductory meeting observation request email.

I am aged 18 or older.

Name: ……………………………………

Signed: …………………………………   **Date:** ……………………………………………

Contact details of Researcher:

Jay Keyse, Henley Business School Research Associate

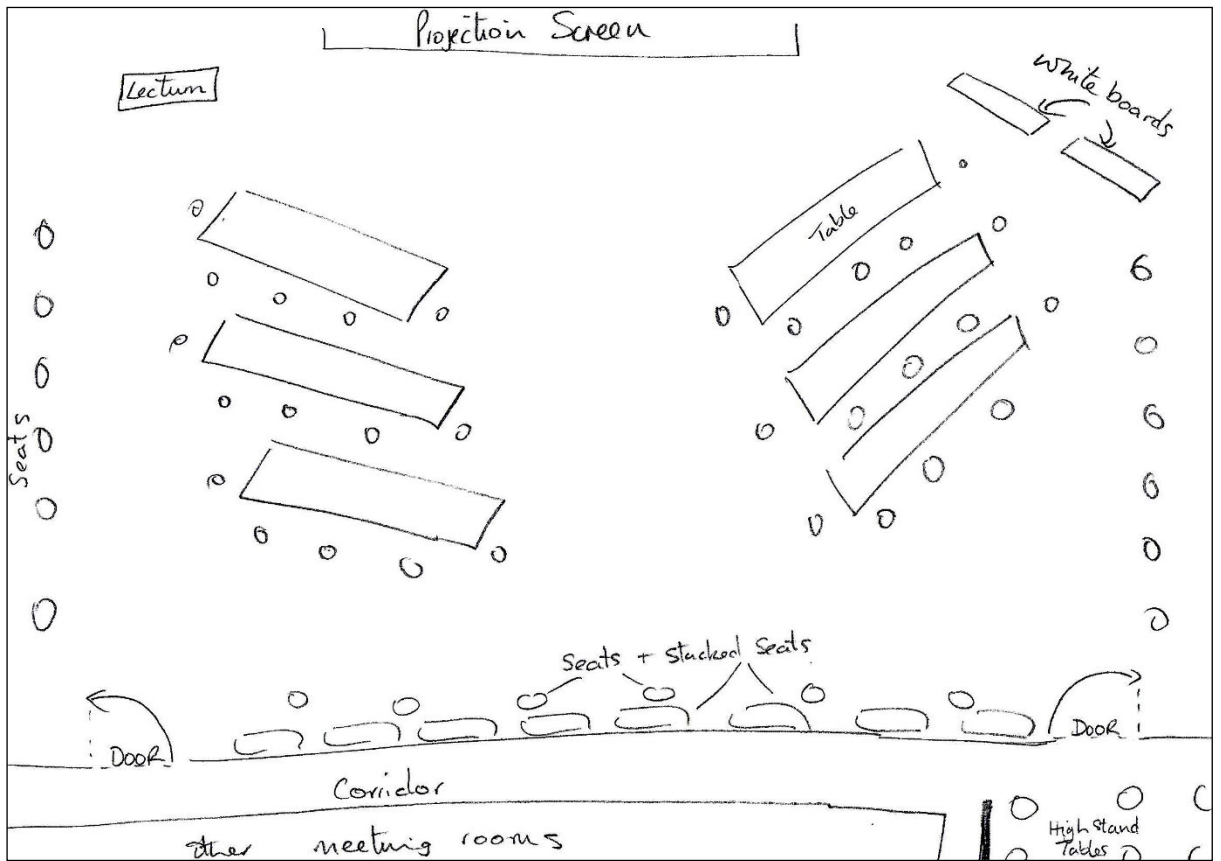Email: Henley Email: j.m.keyse@programme-member.henley.com

Mobile:

Appendix-I: Observation field notes example

Field Notes: Researcher personal feelings & comments:

Observational Field Notes

Tuesday 1st September

XYZ Company office in Amstelveen, Amsterdam.

Researcher is both participating in and observing a 3 day session entitled "Workload and Cloud Practice, EMEA Growth Summit".

The meeting room was located off the main building reception area (quite modern in appearance, angular, glass and white orchids in two silver bowls artistically arranged on the reception desk), down an open corridor with many other meeting rooms.

See separate drawing of room layout for additional context.

The event meeting room was large holding a speaking lectern, projection screen, white boards, 6 large rectangular tables and a copious number of brown chairs both around each table and piled four high at the back of the room between two entrance doors either side.

Although well-lit the room had no windows or natural light and to compensate the two doors were of frosted glass.

Outside the meeting room was a small

Outside the office looked like many other XZY Offices from my previous experience, highly rectangular in appearance, often with blue paneling and lots of glass giving a very stark / functional architectural appearance.

Wow, the whole room feels cluttered even before there are people in it, plus there appears to be no power points anywhere in the room, that won't please people.

Oh great, another meeting room with no windows or natural light – it makes it hard to keep people focused.

No coffee on arrival so people arriving immediately head for the coffee bar.

Well it looks to be an almost all male event so far, and I'm bowled over by the sheer amount (2/3rds) of attendees who arrived "suited and booted", blue shirts (no ties) and blue suits, even though the dress code for the event was stated as business casual (jeans allowed) – a

Appendix figure 1: Observation field notes example

Appendix figure 2: Observation field drawing example

Appendix-J: Email request for primary document selection (Iteration-3)

From: Keyse, Jay
Sent: Sunday, April 8, 2018, 11:33 AM
To: <Email addresses removed to preserve anonymity>
Subject: Doctoral question: Which documents do you consider important when our CPS strategy is communicated?

All,

I'm continuing my doctoral journey and would like to ask you the following hopefully very quick and easy to answer question please:

- 'Which of our many CPS documents (in any format) do you consider important when our CPS strategy is communicated to you and/or the wider NewCo?'

I of course have my own view, but I'd really appreciate yours as well please.

Thanks, and Kind Regards,

Jay

Jay Keyse
Director of Strategy and Partner Enablement

Cloud and Platform Services
T
M

NewCo

Appendix-K: Selection of Genre Analysis

Introduction

In the words of Dorothy Smith and Susan Marie Turner "texts are material objects that carry messages – stone carvings, sand sculptures, writing or pictures on walls, paintings on canvas, writings on cloth, parchment, paper or on computers screens, music recorded on records, CDs, or on tape, images on film, television and so on." (Smith and Turner, 2014, p. 5).

It follows then that with such broad definitions of what constitutes texts there are numerous methods for researchers to use in analysing texts within a study, some of which were considered before the final choice to apply genre analysis was made.

Overview of methods considered for analysing texts

Content Analysis

Although used for both quantitative and qualitative analysis by the academic community since the early 1950s (Wilson, 2016), content analysis is a method for "systematically analysing written, verbal or visual documentation" (Wilson, 2016, p. 41)

However, the lens applied to this discussion is in regard to a focus and use of qualitative content analysis where "the characteristics of language in communication with attention to the content or contextual meaning of the text" (Hsieh and Shannon, 2005, p. 1278) is most prevalent. Hsieh and Shannon further define qualitative content analysis as "a research method for the subjective interpretation of the content of text data through the systematic classification process of coding and identifying themes or patterns." (Hsieh and Shannon, 2005, p. 1278).

Conversation analysis and Membership Categorization Analysis

"Conversation Analysis and Membership Categorization Analysis are two ethnomethological methods for analysing interactional and textual practices"(Stokoe, 2012, p. 277) that tend to be utilized in applied linguistic study with a focus on narratives and talk. CA is a "research method that takes conversations in real-life settings as the object of study, and as a window on to the roles, social relationships, and power relations of participants."

Although from the same stable, MCA is used as a methodology for social class research agendas, focusing predominantly on participants' own categorization and common-sense reasoning about stratified social structures such as class, gender or ethnicity (Lee, 2016).

Discourse analysis

There are many types of Discourse Analysis (DA) ranging from understanding conventions in speech, understanding language in social settings to the descriptive nature of the language used (Dick, 2004). Ultimately as Dick states "Discourse analysis is concerned with how individuals use language in specific contexts."(Dick, 2004, p. 203). Three variants of DA are briefly discussed below:

Critical Discourse Analysis (CDA) – Underpinned by a social constructionist perspective, CDA focuses on the analysis of how individuals use language to explain themselves, their relationship to the world around them and how and why they actively construct these domains (Dick, 2004).

CDA is defined as "the analysis of natural language data, which emphasizes the power relations and ideologies that are both created and conveyed."(Easterby-Smith, Thorpe and Jackson, 2012, p. 340)

Historical Discourse Analysis (Foucauldian approach) – Based on the work of Michael Foucault, grounded in the traditions of philosophy and sociology, who treated discourse as a set of statements that have a constitutive role, i.e., the statements constitute objects and subjects. Ultimately Foucault's work aimed to uncover discursive practices, and although influential in the field of Discourse analysis, is not classed as a method of analysis (Arribas-Ayllon and Walkerdine, 2008).

Organizational Discourse Analysis (ODA) – "ODA is a form of interpretative analysis aimed at deciphering the role of discourse in organizations through examining what language is doing and how it produces texts (Grant, Hardy, Oswick, & Putman, 2004; Grant et al., 2011) cited (Fairhurst and Putnam, 2017, p. 12). Fairhust and Putnam further suggest that ODA researchers focus predominantly on the lived experiences of actors who engage with "tensions, contradictions, dialectics, and paradoxes, and seek to uncover the linguistic subtleties and varieties produced, as well as the communicative "work" in managing oppositions." (Fairhurst and Putnam, 2017, p. 13).

Genre Analysis

(Swales, 1990) states that Genre Analysis is based on multiple influences and an overall integration of several academic field and further, defines Genre Analysis and, that of a genre as "A genre comprises a class of communication events, the members of which share some set of communicative purposes. … exemplars of a genre exhibit various patterns of similarity in terms of structure, style, content and intended audience."(Swales, 1990, p. 58).

For further detail on Genre Analysis see below.

Narrative analysis

As Catherine Kohler Reissman states "The study of narrative does not fit neatly within the boundaries of any single scholarly field." (Reissman, 2002, p. 217) and the narrative-turn has its origins within the interpretive stance of the qualitative-based social sciences realm (Reissman, 2002).

A narrative is defined as "A story or account normally given either verbally or in writing by one person about a situation, a place, a concept or an individual."(Remenyi, 2014, p. 118) and the types of narrative analysis are numerous and varied, two forms of which are now discussed further (Semiotic Narrative Analysis and Storytelling).

Semiotic Narrative Analysis – based on the initial work of Vladimir Propp (1968) and Algirdas Julien Greimas (1966) who developed schemes for the analysis of narrative structures, where schemes initially developed in fairy tales where later applied to other forms of texts, cited in (Peräkylä and Ruusuvuori 2011). Examples of the early schemes developed were focused on structural relationships," e.g., subject vs object, sender vs receiver, helper vs opponent" (Peräkylä and Ruusuvuori 2011, p. 530).

Narrative Analysis via Storytelling, a narratives as practice approach – a more recent form of narrative analysis focuses instead on "*narratives as practice within social interaction*" (Peräkylä and Ruusuvuori 2011, pp. 530, emphasis in original), investigating instead stories and storytelling as those stories operate within the society, how those stories are told, how they are shaped by the actors involved in the telling/retelling and the context in which they are shaped, and even how the stories themselves shape/re-shape the context.

Gabriel and Griffiths (2004, p. 114) suggest that "storytelling is an important organizational phenomenon in its own right" and one that can allow deeper access to organizational realities and its members' experiences.

Gabriel and Griffiths (2004, p. 239) further defines stories as "narratives with plots and characters, generating emotion in narrator and audience, through a poetic elaboration of symbolic material. This material may be a product of fantasy or experience, including an experience of earlier narratives. Story plots entail conflicts, predicaments, trials and crises which call for choices, actions and interactions, whose actual outcomes are often at odds with the characters' intentions and purposes." cited in (Gabriel and Griffiths, 2004, p. 115).

Pictorial Representation

Stiles (2004) suggests that by exploring the underlying phenomena of how people socially construct their realities not just through verbal, but also visual means is integral to understanding organizations. Further, Stiles suggests that "focusing on the images created and interpreted by ordinary people" (Stiles, 2004, p. 128) is key to lessening the researcher 'expert' from the research process.

Textual analysis

"Textual analysis as a methodology is a means of gathering and analysing data and making likely interpretations of that information. It includes analysing not only what is represented but also how it is represented." (Wall, 2006), and that "Textual analysis, then, provides insight into how specific communities of people construct meaning in their lives and work." (Wall, 2006).

Ultimately "what is being analysed is words on paper" (Burnard, 1996, p. 278), and McKee (2001) suggests that textual analysis is a foundational method within cultural and media studies research where the focus is on making sense of and understanding the multiple perspectives within a text, its context, timing, intended recipient audience and what influence the texts' author may have intended.

Textual analysis (as opposed to empirical content analysis) is highly interpretivist and no one text will ever be interpreted the same way by another researcher (McKee, 2001).

The Analysis of Visuals

"Visuals are pervasive in public, work and private space, and we have no choice but to look." (Prosser, 2011, p. 479).

Ultimately visual studies focus on what can be seen by people and the methods for researching visuals appear from my initial scan of academic papers to deal with media (TV, film, broadcast programmes), photographs, web/online sources (Prosser, 2011) and audio-visual materials (Figueroa, 2008), rather than diagrams that are included as visual representations within documents.

Interestingly strategy texts (documents, strategic plans, presentations) are notoriously full of both words and diagrams, and the world of business strategy has numerous examples of such diagrams for both building and communicating strategies, see (Grant, 2008; Cummings and Angwin, 2015; Mintzberg, Ahlstrand and Lampel, 2009).

Little academic research however refers to or discusses these diagrammatic inclusions within the wealth of practitioner-based organizational strategy texts suggesting a notable gap in the current field of knowledge.

Summary comparison of methods

Given there are so many options to choose from when attempting to select a method to analyse texts within a research study one must ask the question - how *does* the research decide which method is most appropriate?

As Easterby-Smith, Thorpe and Jackson (2012) discuss, each research domain has its own favoured language and way of evaluating a research design, and there are a considerable diversity of methods available to the academic researcher, especially within the qualitative constructionist research tradition.

Appendix table-1 below illustrates some of the key features of three methods used predominantly in the analysis of texts, i.e., Discourse analysis, (Hardy, Palmer and Phillips, 2000; Laine and Vaara, 2007; Balogun *et al.*, 2014; Fairhurst and Putnam, 2017), Genre analysis (Kaplan, 2011; Schoeneborn, 2013), and Narrative analysis (Barry and Elmes, 1997; Fenton and Langley, 2011; Balogun *et al.*, 2014).

	Discourse analysis		Genre analysis	Narrative analysis
Variant?	Critical Discourse Analysis (CDA)	Organizational Discourse Analysis (ODA)	PowerPoint genre-in-use	Narratives as practice approach
Focus?	Natural language and focus on power relations & ideologies. Examines language, production of texts and communication processes (Hardy et. al, 2000)	Examines what language does and how it produces texts (Fairhurst and Putnam, 2017)	Whether the 'text' fits within the defined genre; how presentations are used in the day to day strategizing and communication of strategy processes (Kaplan, 2011)	Stories, Storytelling in organizations (Balogun et al, 2014)
Unit of measure?	Individuals, Discourses and discursive practices (Laine and Vaara, 2007)	Lived experiences of actors and communication events (Fairhurst and Putnam, 2017)	Individual slide and then entire presentation deck (Schoeneborn, 2013)	Strategies, stories in use, strategizing processes/practices (Fenton and Langley, 2011)
Methodological alignment?	Interpretivist / Social Constructionist (Balogun et al, 2014)	Social Constructionist	Ethnographic / Social Constructionism	Interpretivist / Constructionism (Barry and Elmes, 1997)
Used in which academic domains?	Social research Strategy as Practice (SAP)	Social research Paradox research	Social research SAP	Social research SAP

Appendix table 1: Comparison of three methods of analysis of texts

Genre Analysis in detail

The genre-based approach is suggested by Swales to be an integration of work from several academic domains (Appendix figure-3) such as Skill and Strategy studies, Discourse Analysis and Cultural anthropology to name but a few (Swales, 1990).

Figure 1 *Influences on a genre-based approach* (Swales, 1990: pp. 14)
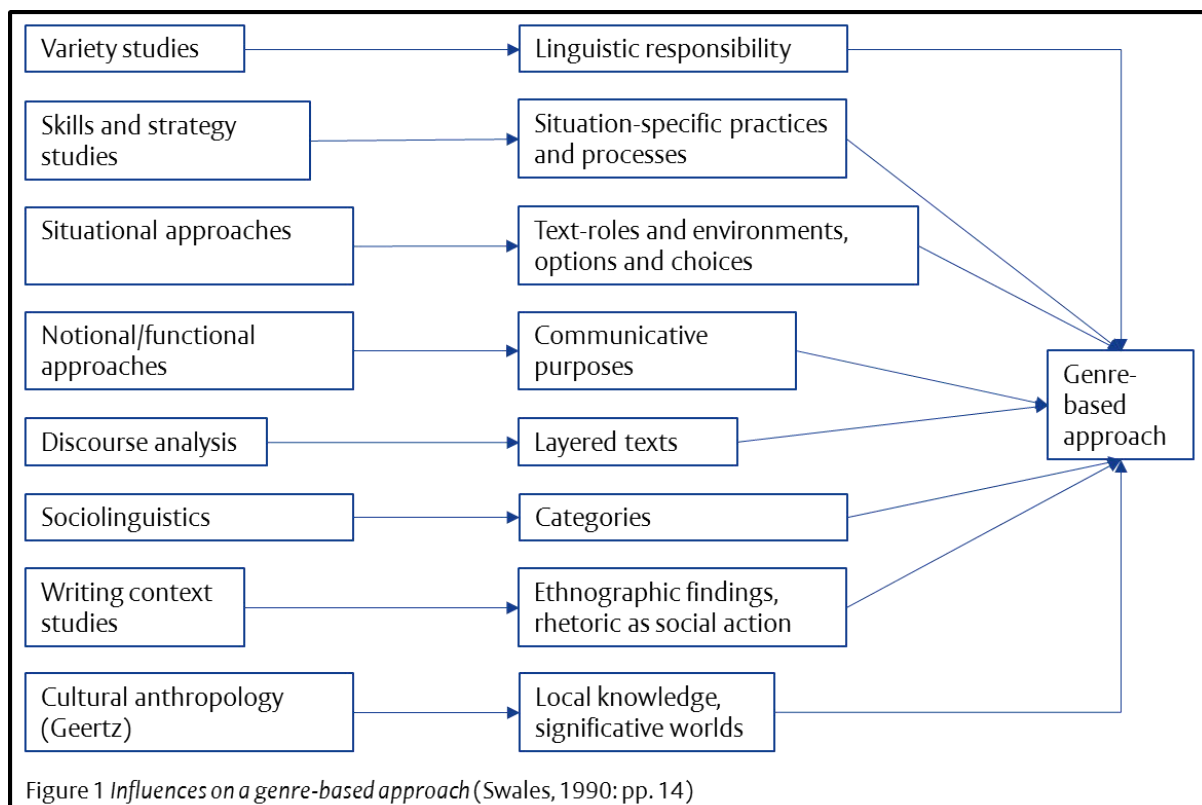
Appendix figure 3: Influences on a genre-based approach

Based on the multiple influences (Appendix figure 3), Swales goes on to define Genre Analysis and that of a genre as "A genre comprises a class of communication events, the members of which share some set of communicative purposes. … exemplars of a genre exhibit various patterns of similarity in terms of structure, style, content and intended audience."(Swales, 1990, p. 58).

(Swales, 1990) also details a working definition of genre based on four (4) characterizations:

1 – A genre is a class of communication events. Where a communicative event comprises the discourse, participants and the role of the discourse and environment/context on its production and reception.

2 – The principal criterial feature that turns a collection of communicative events into a genre is some shared set of communicative purposes. As Sales states, "genres are communicative vehicles for the achievement of goals."(Swales, 1990, p. 46).

3 – Exemplars or instances of genres vary in their prototypicality. Not only do genres have the feature of communicative purpose, but that each occurrence within a genre may either have a family resemblance and/or a definitional alignment.

4 – The rationale behind a genre establishes constraints on allowable contributions in terms of their content, positioning, and form. The shared set of values associated with a genre will be recognized by those discourse communities that use the said genre to realize their goals.

Yates and Orlikowski (2002) extend the definition of genre even further by defining genre systems as "sequences of interrelated communicative actions (Bazerman, 1994; Orlikowski & Yates, 1994)" and that these genre systems "are important means of structuring collaborative work both tacitly as habitual mechanisms and explicitly as deliberate devices." (Yates and Orlikowski, 2002, p. 14).

How is Genre Analysis applied and performed?

<u>Applied</u>:

- Expectations of why, how, what, who, when and where used as initial coding guides on interview transcripts, PowerPoint documents and field notes, after (Kaplan, 2011) - allows further identification of differing purposes to sign-post a subset of texts for further focused analysis
- Time and place relationship - Genres associated with specific time and place constructs (Rutherford, 2005),
- Can also be used to look at the production and use of PowerPoint documents, which enables a comparison between the two genres-in-use applications, after (Kaplan, 2011).

<u>Performed</u>:

- Word frequency counts - where difference in word count frequency taken as a suggestion of sub-genres (Rutherford, 2005),

- Qualitative coding - coding for themes within the texts (Rutherford, 2005),
- Analysing the schematic structure e.g.: intro, body, ending (Swales, 1990; Bonyadi, 2012),
- Looking for interrelated conventions of:
  - Recurrence of rhetorical situations that are context driven i.e., rhetorical moves (Swales, 1990; Bhatia, 1997; Bonyadi, 2012; Eisenhart and Roscoe, 2016),
  - Shared communicative purpose embedded within the context (Bhatia, 1997),
  - Regularities of structural organization (lexico-grammar) (Bhatia, 1997).

Now turning to look further at how the academic community has utilized Genre Analysis in the last decade, a brief comparison of three academic papers (Appendix table 2) is offered to illustrate the key similarities and differences in approaches applied.

Appendices

	Article 1	Article 2	Article 3
Title, Author, date	Strategy as text and discursive practice: a genre-based approach to strategizing in city administration (Pälli, Vaara and Sorsa, 2009)	Strategy and PowerPoint: An Inquiry into the Epistemic Culture and Machinery of Strategy Making (Kaplan, 2011)	The Pervasive Power of Point: How a Genre of Professional Communication Permeates Organizational Communication (Schoeneborn, 2013)
Focus of analysis	Focused on the analysis of generic features within the text; analyzed communicative purposes of the text (specifically: education, self-legitimation, guiding future action, building identity and promotion)	Focused on uncovering purposes, themes and patterns that connected the purposes and chronologies for strategy documents in use in strategy projects	Focused on identifying a set of PowerPoint sub-genres in the texts that show the underlying interrelations between professional and organizational communication
Genre	Strategy genre	Communication genre-in-use; PowerPoint genre-in-use	PowerPoint genre

Methodological approach	Qualitative Textual/discourse analysis	Qualitative. Open-ended inductive approach using ethnographic methods and Genre analysis. Genre analysis comprised of initial coding (to identify different purposes), followed by open coding (to identify themes and patterns that connect the purposes). Also developed chronologies of several ongoing strategy projects and matched PowerPoint decks to various stages of the projects. A comparison of the two forms of Genre analysis was then performed to gain further insights	Qualitative, open coding of individual slides (searching for 1-primary target audience; 2-topic and purpose of each slide; 3-formatting features), followed by sequential analysis of the entire slide show (deck) to compare typical sequences of coded elements. This was then followed with analysis "of the entire genre-repertoire" (Schoeneborn, 2013, p. 1787) then grouping and in-vivo labeling these into 3 sub-genres. Four main indicators where established and insights sought.
Research setting and Data gathered	Single organizational case. A single strategy text and 16 audio recorded meetings during the strategy update process of the case organization	Single organizational case. Numerous observations, 80 formal unstructured interviews, 30+ formal team meetings and collection of multiple documents	Single organizational case. PowerPoint and project documents and 14 qualitative interviews. 565 primary documents included in final sample

Appendix table 2: Comparison of how studies claiming a genre-based approach conducted the analysis of text

……………... End………………………..